

FINANCIAL & PROFESSIONAL SERVICES

INDUSTRY OVERVIEW



As the fastest growing industry sector in the Tampa metro area, our financial and professional services businesses have year-over-year employment gains of 7 percent and a workforce of more than 248,000.

For more than 40 years, Tampa and Hillsborough County have offered a competitive alternative to the traditional financial centers of New York, Chicago, and Boston.

Today, we are Florida's preferred business destination and many of the nation's leading corporations in banking, finance, and insurance call Tampa Bay home.

With business-friendly government and community support, no state income tax, an affordable cost of living, and enviable quality of life, choosing Tampa and Hillsborough County just adds up.

"The Tampa market has just been tremendous for us as we have been growing and having to fill our new building with nearly 1,200 employees. The fact that we added a second campus in Tampa gave us the opportunity to really broaden our footprint."

- YVETTE SEGURA, VICE PRESIDENT AND GENERAL MANAGER, TAMPA CAMPUS, USAA

TAMPA BAY'S LEADING FINANCIAL & PROFESSIONAL SERVICES COMPANIES



DTCC

Securing Today. Shaping Tomorrow.®

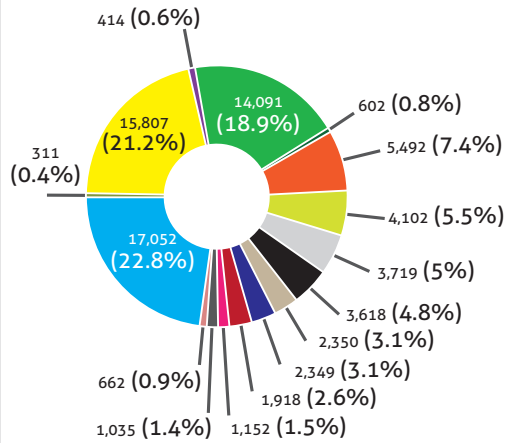


Aetna
Capital One
Citi
Depository Trust & Clearing Corporation (DTCC)
Franklin Templeton Investments

Humana
JPMorgan Chase
MetLife
Morgan Stanley
New York Life
Progressive Insurance
PwC

Raymond James Financial
Sykes Enterprises
T. Rowe Price
USAA
Willis Towers Watson

FINANCIAL & PROFESSIONAL SERVICES INDUSTRY OCCUPATION TOTAL 2017 JOBS

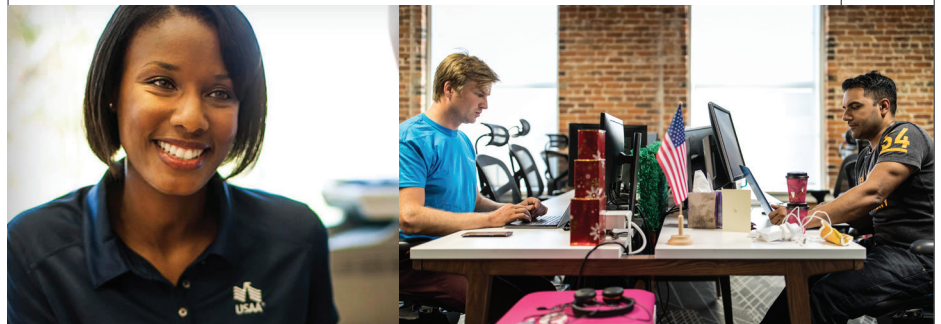


- Bookkeeping, Accounting, and Auditing Clerks
- First-Line Supervisors of Office and Administrative Support Workers
- Accountants and Auditors
- Market Research Analysts and Marketing Specialists
- Financial Managers
- Paralegals and Legal Assistants
- Software Developer, Systems Software
- Financial Analysts
- Administrative Services Managers
- Marketing Managers
- Human Resources Managers
- Financial Specialists, All Other
- Credit Analysts
- Purchasing Managers
- Budget Analysts
- Training and Development Managers

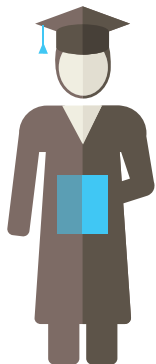
AVERAGE WAGE BY FINANCIAL & PROFESSIONAL SERVICES OCCUPATION

SOC CODE	OCCUPATION	AVERAGE WAGE TAMPA MSA	U.S.
13-2011	Accounts and Auditors	\$72,200	\$76,700
13-2031	Budget Analysts	\$76,800	\$77,200
13-2041	Credit Analysts	\$77,500	\$81,200
13-2051	Financial Analysts	\$74,900	\$97,600
11-3121	Human Resources Managers	\$111,600	\$120,200
13-1161	Market Research Analysts and Marketing Specialists	\$67,600	\$70,600
23-2011	Paralegals and Legal Assistants	\$49,700	\$53,200
15-1133	Software Developer, Systems Software	\$90,100	\$110,600
11-3131	Training and Development Managers	\$106,900	\$115,200
11-3011	Administrative Services Managers	\$109,100	\$98,900
11-3031	Marketing Managers	\$122,100	\$144,100
11-3061	Purchasing Managers	\$122,900	\$117,700
13-2099	Financial Specialists, All Other	\$76,500	\$76,200

Source: JobsEQ®, 2017 Q2.



TOTAL FLORIDA DEGREES AWARDED BY LEVEL



Bachelor's
104,805

Post Graduate
43,210

Source: National Center for Education Statistics (NCES), 2014-2015

TAMPA MSA FINANCIAL & PROFESSIONAL SERVICES DATA

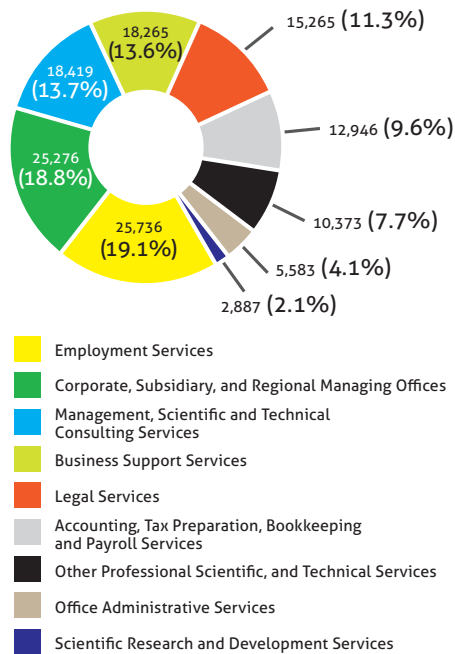
\$62,246 AVERAGE
ANNUAL WAGES

231,995 EMPLOYEES

11,940 COMPANIES

Source: JobsEQ®, 2016

FINANCIAL & PROFESSIONAL SERVICES INDUSTRY SECTORS TOTAL 2017 JOBS



AVERAGE WAGE BY FINANCIAL & PROFESSIONAL SERVICES SECTORS

NAICS CODE	SECTORS	AVERAGE WAGE TAMPA MSA	U.S.
551114	Corporate, Subsidiary, and Regional Managing Offices	\$82,032	\$113,484
5412	Accounting, Tax Preparation, Bookkeeping and Payroll Services	\$75,620	\$71,527
2416	Management, Scientific and Technical Consulting Services	\$66,167	\$92,100
5611	Office Administrative Services	\$52,895	\$82,700
5613	Employment Services	\$38,829	\$33,965
5614	Business Support Services	\$31,833	\$40,148
5417	Scientific Research and Development Services	\$75,358	\$122,532
5411	Legal Services	\$80,091	\$93,529
5419	Other Professional Scientific, and Technical Services	\$57,385	\$50,556

Source: JobsEQ®, 2017 Q2.

INDUSTRY HIGHLIGHTS



WILLIS TOWERS WATSON announced plans to open its Operational Center of Excellence in Tampa in December 2015.

The Center serves as the global risk advisory, re/insurance broking, and human capital and benefits firm's Southeast regional hub. The Center opening created more than 150 positions and \$9 million in capital investment.



CITI manages 32 international locations and is at the forefront of its cybersecurity and anti-money laundering (AML)

functions from its Tampa campus. Citi employs more than 5,000 here and announced significant growth plans in 2016, thanks to the excellent talent it continues to find in Tampa.



USAA has maintained a presence in Tampa and Hillsborough County for many decades, with two campuses

in New Tampa and Brandon. In November 2013, USAA made one of the most significant economic development announcements in local history, announcing plans to expand its presence by creating 1,215 new jobs and \$164.3 million in capital investment. They announced plans to add another 1,200 jobs in August of 2017.



DTCC originally selected Tampa as the site of a redundant operations center with 300 jobs a few years after September

11th impacted the New York financial markets. Now, a decade later, the site stands as a fully-integrated business operations unit with 1,000 staff and counting, who are conducting finance, legal, human resources, marketing, audit, and IT operations.

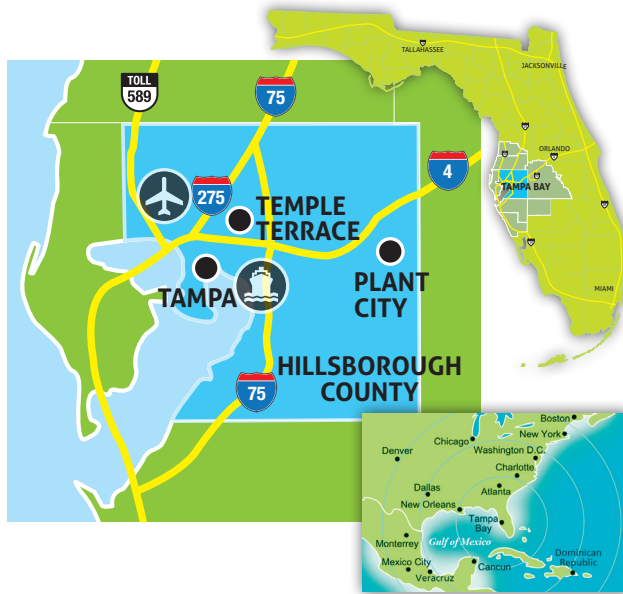
DEMOGRAPHICS

TOTAL MSA POPULATION: **3M**
 TOTAL MSA LABOR FORCE: **1.5M**
 MEDIAN AGE: **37**
 COLLEGE DEGREE HOLDERS: **31%**
 COST OF LIVING INDEX: **94.8** (2017)

RANKINGS

#1 CITY FOR FIRST TIME HOME BUYERS
 (ZILLOW, 2018)
#1 BEST STATES IN THE NATION FOR
 HIGHER EDUCATION
 (U.S. NEWS & WORLD REPORT, 2018)
#2 BEST STATES FOR BUSINESS
 (CHIEF EXECUTIVE MAGAZINE, 2017)

CONNECTIVITY



Hillsborough County is home to the top-rated Tampa International Airport (TPA), located just 15 minutes from downtown Tampa. Approximately 19 million people are served by major air carriers each year at TPA on more than 250 daily flights. TPA offers over 80 nonstop flights to domestic and international destinations.

Port Tampa Bay is the largest and most diversified port in Florida, with more than 5,000 acres of land and handling over 37 million tons of cargo every year. As the closest full-service port to the Panama Canal, Port Tampa Bay opens up exporting opportunities to Latin America and Asia.

Tampa and Hillsborough County are connected to the entire United States by roads and rail as well. Interstate systems I-4, I-75, and I-275 link the region to numerous major U.S. cities and more than 33 million consumers within an eight-hour drive.



TAMPA HILLSBOROUGH
 ECONOMIC DEVELOPMENT CORPORATION



For more information on the financial & professional services industry in Tampa and Hillsborough County, please contact Steve Morey, Vice President, Business Development, at (813) 518-2630 or smorey@tampaedc.com

Tampa Hillsborough Economic Development Corporation is the lead designated economic development agency for Hillsborough County and the cities of Tampa, Plant City, and Temple Terrace. Established in 2009 as a partnership between the public sector and private corporate investors, the EDC works to develop and sustain a thriving local economy through the attraction, retention, and expansion of high wage jobs and capital investment within targeted industry sectors.