

Greenwich Associates

Recognizes

Excellence in Wealth Management and Personal Investment Services



2015 Greenwich Excellence Awards for Wealth Management and Personal Investment Services

Among More Than 150 Providers Evaluated, 11 Had Distinctive Quality

Traditional Wealth and Retail Investment Providers

Overall Satisfaction	Likelihood to Recommend	Investment Advice/Ideas	Customer Service
Raymond James	Edward Jones	Ameriprise Financial	Ameriprise Financial
USAA Investment Management	Raymond James	Edward Jones	Edward Jones
Vanguard	USAA Investment Management	LPL Financial	Raymond James
	Vanguard	Morgan Stanley	USAA Investment Management
		Raymond James	
		USAA Investment Management	

Chartered Banks with Wealth and Retail Investment Services

Likelihood to Recommend	Investment Advice/Ideas	Customer Service
BB&T	BB&T	BB&T
Huntington	SunTrust	Regions Bank
Regions Bank		

Based on 8,000 interviews with business owners and executives across the country.
The findings reported in this document reflect solely the views reported to Greenwich Associates by the research participants.
They do not represent opinions or endorsements by Greenwich Associates or its staff.

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