

# Greenwich Associates

Recognizes

## Excellence in Wealth Management and Personal Investment Services



### 2016 Greenwich Excellence Awards for Wealth Management and Personal Investment Services

*Among More Than 150 Providers Evaluated, 12 Had Distinctive Quality*

#### **Traditional Wealth and Retail Investment Providers**

<b>Overall Satisfaction</b>	<b>Likelihood to Recommend</b>	<b>Investment Advice/Ideas</b>	<b>Customer Service</b>
Edward Jones	Navy Federal	Edward Jones	Edward Jones
Navy Federal	Financial Group	Raymond James	Navy Federal
Financial Group	USAA Investment	USAA Investment	Financial Group
USAA Investment	Management	Management	Raymond James
Management	Vanguard		USAA Investment
Vanguard			Management

#### **Chartered Banks with Wealth and Retail Investment Services**

<b>Overall Satisfaction</b>	<b>Likelihood to Recommend</b>	<b>Investment Advice/Ideas</b>	<b>Customer Service</b>
BB&T	BB&T	BB&T	BB&T
BBVA Compass Bank	Huntington National	SunTrust	BBVA Compass Bank
Huntington National	Bank		First Tennessee Bank
Bank			Huntington National
SunTrust			Bank
			PNC Bank
			Regions Bank

Based on 11,100 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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