



## 2017 Greenwich Excellence Awards for Wealth Management and Personal Investment Services

*Among More Than 150 Providers Evaluated, 6 Had Distinctive Quality*

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

#### **Overall Satisfaction**

Raymond James  
USAA Investment Management  
Vanguard

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

#### **Overall Satisfaction**

Chase  
Regions Bank  
SunTrust

Based on approximately 10,300 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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