

SURVEY RESULTS

	OVERALL SATISFACTION SCORE	COMPANY TYPE	CUSTOMER SERVICE	PERSONAL ADVICE	ACCOUNT SETUP	MET GOALS	ALLOCATI
Edelman Financial Services	92	Traditional investment firm	5 /5	5 /5	5 /5	5 /5	
Vanguard	92	Online investment firm	5 /5	4 /5	5 /5	4 /5	
USAA	90	Online investment firm	5 /5	4 /5	5 /5	4 /5	
Baird	89	Traditional investment firm	5 /5	5 /5	5 /5	4 /5	
Fisher Investments	89	Traditional investment firm	5 /5	5 /5	5 /5	5 /5	
Thrivent Financial	88	Traditional investment firm	5 /5	5 /5	4 /5	4 /5	
Charles Schwab	OVERALL	COMPANY TYPE	CUSTOMER SERVICE	PERSONAL ADVICE	ACCOUNT SETUP	MET GOALS	ALLOCATI

	SATISFACTION SCORE 88	Online investment firm	5 /5	4 /5	4 /5	3 /5	
Vanguard Personal Advisor Services	OVERALL SATISFACTION SCORE 87	Robo-adviser	4 /5	4 /5	4 /5	4 /5	
RBC Wealth Management	OVERALL SATISFACTION SCORE 87	Traditional investment firm	5 /5	5 /5	5 /5	4 /5	
Raymond James	OVERALL SATISFACTION SCORE 87	Traditional investment firm	5 /5	5 /5	5 /5	4 /5	

Ratings are based on Consumer Reports' 2017 Summer Survey of 46,274 CR members reporting on 61,893 investment firm experiences. Reader Score represents customers' overall satisfaction with their investment firm(s). If all respondents are completely satisfied with their investment firm, the Reader Score would be 100; a score of 80 indicates that respondents are "very satisfied," on average; 60, "somewhat satisfied." Differences of less than 5 points are not meaningful. Ratings for customer service are based on a six-point satisfaction scale. The other attributes listed under Survey Findings are based on a six-point 'Excellent' to 'Very poor' scale." Ratings are based on the experiences of CR members, who may not be representative of the general US population. Dashes ("-") indicate insufficient sample sizes to provide a rating or that an attribute is not applicable to an investment firm.