

2024 DRINKRAGE REPORT CARD

How investment advisors rated their firms' support offerings

	INDEPENDENT BROKERS								BANK-OWNED INVESTMENT DEALERS						2024 performance average	Category importance average
	CG Wealth Management	Edward Jones	IG Private Wealth	Lewis James Rubin	Robert Brown	Raymond James	Richardson Wealth	Wellington Advisors Private Wealth	BBK Wealth Services	CBK Wealth Services	National Bank Financial	BBK US	Scotiabank	TD Wealth USA		
Number of advisors increased per firm	40	51	51	51	51	50	50	40	50	50	50	50	50	50		
Adviser pay ¹																
Compensation structure																
Bonus structure																
Technology tools																
Client onboarding tools																
Client relationship tools																
Client account statements & reports																
Systems for fee-based advisors																
Technology training & internal IT support																
Support for outside system access & transactions																
Adviser's experience with back office tools & services																
Business & sales development																
Business development & marketing support																
Social media training, content & compliance																
Adviser education & development																
Branch manager																
Succession planning support for advisors																
Multi-manager tools																
Products & support for high-net-worth clients																
Financial planning support & technology																
Support for tax planning, wills & estates																
Support for insurance planning																
Support for discretionary portfolio management																
Products ²																
Quality of firm's product shelf																
Flexibility to make product choices																
Firm's culture																
Leadership team																
Strategic focus																
Effectiveness in keeping advisors informed																
Responsiveness to adviser feedback																
Ownership, equity & incentive practices ³																
Compliance relationship & support ⁴																
IF rating (average of all categories)																
Net Promoter Score (range: -100 to 100)																

All ratings are based on a scale of one to 10.

Numbers in **green** indicate a rating has increased by at least 0.5 of a point from last year. Numbers in **red** indicate a rating has decreased by at least 0.5 of a point from last year.

The "performance average" below all the ratings by advisors in a given category averages these together. You can check to see if a company is above or below the average.

The "importance average" below all the importance ratings by advisors in a given category averages these together. It is intended to measure how important advisors think a Report Card

category is to their business. It is separate from the performance ratings.

The "IF rating" is an average of all of a company's category ratings by advisors, excluding Net Promoter Score. It measures how advisors feel about their own firm overall and isn't used as a ranking tool.

The Net Promoter Score ranges from -100 to 100. A score of zero or more is considered good, of 50 or more is considered excellent and of 70 or more is considered exceptional. Net Promoter® and NPSC are registered trademarks of Bain & Company Inc., Schwartz Systems Inc., and Fred Beckhard. Net Promoter® Score is a service mark of

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N/A denotes a category does not apply to a company. N/C means the category is not calculable as not enough advisors rated it to be a reasonable sample.

1. The adviser pay and product categories do not focus on adviser earnings, growth or sales activity, or on firms' revenues. For pay, the focus is on compensation (salary, for products, the focus is on quality and variety of the shelf.
2. New category or category has changed materially year over year.

Notes that make category names have been added for clarity, while other categories have been removed compared with past years based on industry change and/or their relevance.

The Report Card scores can't be directly compared or contrasted, and it isn't a ranking exercise. Historical data ratings are not based on sales activity, revenue or profits.

Source: Investment Executive research

Investment Executive Report Card

Daniel F McAuley



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Table of Contents Investment Executive Report Card

1. Understanding the eBook Investment Executive Report Card
 - The Rise of Digital Reading Investment Executive Report Card
 - Advantages of eBooks Over Traditional Books
2. Identifying Investment Executive Report Card
 - Exploring Different Genres
 - Considering Fiction vs. Non-Fiction
 - Determining Your Reading Goals
3. Choosing the Right eBook Platform
 - Popular eBook Platforms
 - Features to Look for in an Investment Executive Report Card
 - User-Friendly Interface
4. Exploring eBook Recommendations from Investment Executive Report Card
 - Personalized Recommendations
 - Investment Executive Report Card User Reviews and Ratings
 - Investment Executive Report Card and Bestseller Lists
5. Accessing Investment Executive Report Card Free and Paid eBooks
 - Investment Executive Report Card Public Domain eBooks
 - Investment Executive Report Card eBook Subscription Services
 - Investment Executive Report Card Budget-Friendly Options

6. Navigating Investment Executive Report Card eBook Formats
 - ePub, PDF, MOBI, and More
 - Investment Executive Report Card Compatibility with Devices
 - Investment Executive Report Card Enhanced eBook Features
7. Enhancing Your Reading Experience
 - Adjustable Fonts and Text Sizes of Investment Executive Report Card
 - Highlighting and Note-Taking Investment Executive Report Card
 - Interactive Elements Investment Executive Report Card
8. Staying Engaged with Investment Executive Report Card
 - Joining Online Reading Communities
 - Participating in Virtual Book Clubs
 - Following Authors and Publishers Investment Executive Report Card
9. Balancing eBooks and Physical Books Investment Executive Report Card
 - Benefits of a Digital Library
 - Creating a Diverse Reading Collection Investment Executive Report Card
10. Overcoming Reading Challenges
 - Dealing with Digital Eye Strain
 - Minimizing Distractions
 - Managing Screen Time
11. Cultivating a Reading Routine Investment Executive Report Card
 - Setting Reading Goals Investment Executive Report Card
 - Carving Out Dedicated Reading Time
12. Sourcing Reliable Information of Investment Executive Report Card
 - Fact-Checking eBook Content of Investment Executive Report Card
 - Distinguishing Credible Sources
13. Promoting Lifelong Learning
 - Utilizing eBooks for Skill Development
 - Exploring Educational eBooks
14. Embracing eBook Trends
 - Integration of Multimedia Elements

- Interactive and Gamified eBooks

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