

Investment Companies



Ratings (As of August 2019)		Survey Results									
Reader Score	Brokerage services	Company type	Customer service	Personal advice	Account setup	Met goals	Allocation control	Fee transparency	Investment returns	Fee amount	Online resource advice
92	Edelman Financial Services	Traditional investment firm	↑	↑	↑	↑	↑	↑	↑	↓	-
92	Vanguard	Online investment firm	↑	↑	↑	↑	↑	↑	↑	↑	↑
90	USAA	Online investment firm	↑	↑	↑	↑	↑	↑	↓	↑	↑
89	Baird	Traditional investment firm	↑	↑	↑	↑	↑	↓	↑	↓	↑
89	Fisher Investments	Traditional investment firm	↑	↑	↑	↑	↓	↑	↑	↓	↑
88	Thrivent Financial	Traditional investment firm	↑	↑	↑	↑	↑	↓	↑	↑	↑
88	Charles Schwab	Online investment firm	↑	↑	↑	↓	↑	↑	↓	↑	↑
87	Vanguard Personal Advisor Services	Robo-adviser	↑	↑	↑	↑	↑	↑	↓	↑	↑
87	RBC Wealth Management	Traditional investment firm	↑	↑	↑	↑	↑	↓	↑	↓	↑
87	Raymond James	Traditional investment firm	↑	↑	↑	↑	↑	↓	↑	↓	↑
87	Edward Jones	Traditional investment firm	↑	↑	↑	↑	↑	↓	↑	↓	↑
87	Janney Montgomery Scott LLC	Traditional investment firm	↑	↑	↑	↑	↑	↓	↓	↓	-
87	Stifel, Nicholas & Company	Traditional investment firm	↑	↑	↑	↑	↑	↓	↓	↓	↑
86	D.A. Davidson Companies	Traditional investment firm	↑	↑	↑	↑	↑	↓	↓	↓	-
86	Hilliard Lyons	Traditional investment firm	↑	↑	↑	↑	↑	↓	↓	↓	-
86	Northwestern Mutual	Traditional investment firm	↑	↑	↑	↑	↑	↓	↓	↓	↑
85	E*TRADE	Online investment firm	↑	↓	↑	↓	↑	↑	↓	↑	↓
85	Wealthfront	Robo-adviser	↑	-	↑	↑	↓	↑	↑	↑	↑

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85	Fidelity Investments	Online investment firm	↑	↑	↑	↓	↑	↓	↓	↓	↑
85	Cetera Financial Group	Traditional investment firm	↑	↑↑	↑	↑	↑	↓	↓	↓	-
85	UBS Financial Services	Traditional investment firm	↑	↑	↑	↑	↑	↓	↓	↓	↑
85	Ameriprise Financial	Traditional investment firm	↑	↑↑	↑	↑	↑	↓	↓	↓	↑
84	TIAA	Traditional investment firm	↑	↑	↑	↑	↓	↓	↓	↑	↑
84	Betterment LLC	Robo-adviser	↑	-	↑↑	↓	↓	↑	↓	↑	↑
84	TD Ameritrade	Online investment firm	↑	↓	↑	↓	↑	↓	↓	↑	↑
84	LPL Financial	Traditional investment firm	↑	↑	↑	↑	↑	↓	↓	↓	↑
84	E*TRADE Core Portfolios	Robo-adviser	↑	-	↑	↓	↑	↓	↓	↑	-
84	Commonwealth Investment Advisors	Traditional investment firm	↑	↑↑	↑	↑	↑	↓	↓	↓	↑
84	Charles Schwab Intelligent Portfolios	Traditional investment firm	↑	-	↑	↓	↓	↓	↓	↑	↑
83	Morgan Stanley	Traditional investment firm	↑	↑	↑	↑	↑	↓	↓	↓	↑
82	Merrill Lynch	Traditional investment firm	↑	↑	↑	↓	↑	↓	↓	↓	↑
81	Fidelity Go	Robo-adviser	↑	↑	↓	↓	↓	↓	↓	↓	↑
81	First Command Financial Services	Traditional investment firm	↑	↑	↑	↑	↓	↓	↓	↓	↑
81	Wells Fargo Advisors	Traditional investment firm	↑	↑	↑	↓	↑	↓	↓	↓	↑
81	Lincoln Financial Group	Traditional investment firm	↑	↑	↑	↓	↓	↓	↓	↓	↑
80	State Farm	Traditional investment firm	↑	-	↓	↓	↓	↓	↓	↓	-
80	Nationwide Financial	Traditional investment firm	↑	↓	↓	↓	↓	↓	↓	↓	↓
79	Waddell & Reed	Traditional investment firm	↑	↑	↑	↓	↓	↓	↓	↓	↑
79	TD Ameritrade Essential Portfolios	Robo-adviser	↓	-	↓	↓	↓	↓	↓	↓	-
79	AXA Investment Managers	Traditional investment firm	↑	↑	↓	↓	↓	↓↓	↓	↓↓	↑
79	PNC Financial Services	Traditional investment firm	↓	↓	↑	↓	↓	↓	↓	↓	-

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79	J.P Morgan	Traditional investment firm	↑	↓	↑	↓	↓	↓	↓	↓	↓
78	MassMutual	Traditional investment firm	↓	↑	↓	↓	↓	↓	↓	↓	↓
78	Voya Financial	Traditional investment firm	↓	↑	↓	↓	↓	↓	↓	↓	↓
78	Primerica	Traditional investment firm	↓	-	↓	↓	↓	↓	↓	↓	-
78	Prudential Financial	Traditional investment firm	↑	↑	↓	↓	↓	↓	↓	↓	↓
77	New York Life Insurance Company	Traditional investment firm	↑	↑	↓	↓	↓	↓	↓	↓	-
77	John Hancock Financial	Traditional investment firm	↑	-	↓	↓	↓	↓	↓	↓	-
76	Principal Funds	Traditional investment firm	↓	↓	↓	↓	↓	↓	↓	↓	↓
75	Transamerica Financial Advisors	Traditional investment firm	↓	-	↓	↓	↓	↓	↓	↓	-

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.