



Awards:

Commonwealth Ranked #1 in J.D. Power Study

July 2022

As an independent firm, it is vitally important that we have strong, reliable partners to support our mission of helping you achieve your wealth management and retirement planning goals.

With that in mind, we thought you'd like to know that Commonwealth Financial Network has been recognized by J.D. Power again this year for highest overall satisfaction among independent advisors.*

The U.S. Financial Advisor Satisfaction Study measures satisfaction among both employee advisors (those who are employed by an investment services firm) and independent advisors (those who are affiliated with a broker-dealer but operate independently) based on six key factors (in alphabetical order): compensation; leadership and culture; operational support; products and marketing; professional development; and technology. The study is based on responses from 3,039 employee and independent financial advisors and was fielded from January through May 2022.

While we are reminded on a daily basis of the excellent customer satisfaction Commonwealth provides for us and all our clients, it is still a comfort to us (and hopefully to you, too) to have a prestigious group like J.D. Power demonstrates that we are working with the best in the business.

As always, please don't hesitate to get in touch if we can be of any assistance.

Best regards from all of us at Investmark.

**Commonwealth received the highest score among independent advisors in the J.D. Power 2010, 2012, 2013, 2014, 2018-2022 U.S. Financial Advisor Satisfaction Studies of*



Commonwealth

#1 in Independent Advisor Satisfaction among Financial Investment Firms, 9 Times in a Row.

independent advisors' satisfaction among those who are affiliated with a broker-dealer but operate independently. Visit jdpower.com/awards for more details.

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Financial Advisor Magazine's ("FA Mag") annual RIA ranking and survey ranks firms solely on assets under management ("AUM"). The magazine gathered data from RIA firms, regulatory disclosures, and their own research in compiling a list of 715 firms. The ranking should not be construed as an endorsement of the firm's advisory services and is not indicative of the advisor's future performance. Your experience may vary. For more information, please visit: <https://www.fa-mag.com/ria-survey-2020-form>

Financial Advisor Magazine's ("FA Mag") annual RIA ranking and survey ranks firms solely on assets under management ("AUM"). The magazine gathered data from RIA firms, regulatory disclosures, and their own research in compiling a list of 707 firms. For the "Top 50 Fastest Growing RIA" list, FA Mag identified 50 firms, with over \$250 million in AUM, with the highest percentage growth in assets from 2016-2017. The ranking should not be construed as an endorsement of the firm's advisory services and is not indicative of the advisor's future performance. Your experience may vary. For more information, please [click here](#):

The Financial Times 300 Top Registered Investment Advisers 2016 is based on six broad factors, including adviser assets under management (\$300 million minimum), asset growth, company's age, industry certifications of key employees, and compliance record and accessibility. 520 Registered Investment Advisers were considered; 300 (58% of candidates) were recognized. Not indicative of advisor's future performance. Your experience may vary. For the full methodology, please visit www.ft.com

Investment News Best Place to Work: Firms were evaluated based on employer and employee surveys, covering company culture, benefits, career path, and more.

