



Ranked
1
in Overall
Satisfaction

 Wealth
Management.com

2017 IBD REPORT CARD

INDEPENDENT FINANCIAL GROUP

Overall Score: 9.63 out of 10

Location: San Diego, CA

Number of Producing Advisors: 600

Firm AUM: \$16.5 Billion

Founded: 2003

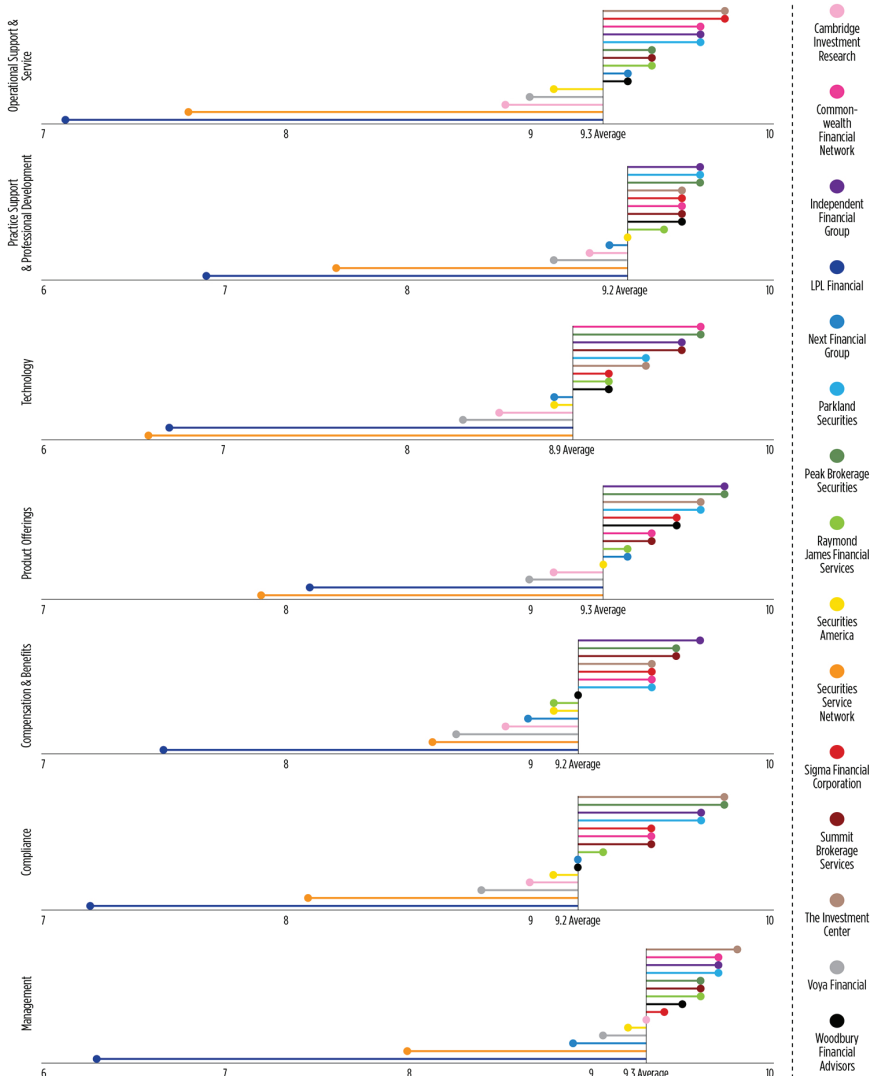


THE 2017 INDEPENDENT BROKER/DEALER REPORT CARD

Published on Wealth Management's website on April 6, 2017 by Diana Britton.
www.wealthmanagement.com/industry/2017-independent-brokerdealer-report-card

Zooming In

Advisors rate their experience with their firms across key service areas (1 = unacceptable, 10 = outstanding).

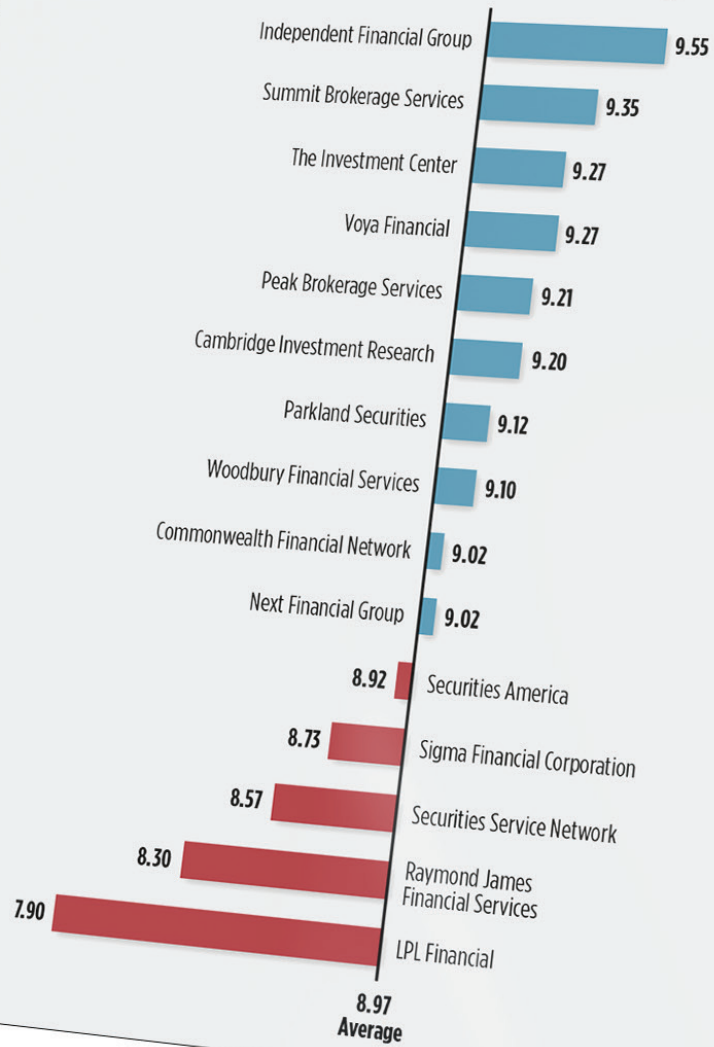


Scores trended down in the 2017 Independent Broker/Dealer Report Card Survey for the second year in a row.

While brokers are still largely satisfied with the firms they affiliate with, scores have trended down since 2015, according to WealthManagement.com's annual Independent Broker/Dealer Report Card. This year, the average satisfaction score was 8.96, down from 9.1 last year and 9.2 in 2015. The annual survey asks advisors from independent brokerages to rate the firms they work with from 1 (unacceptable) to 10 (outstanding) on a number of factors, including service, technology and practice management. WealthManagement.com fielded the online survey via emailed invitations to print subscribers, online registrants and advisors at over 80 IBDs in the publication's database. Between Feb. 9 and March 10, we received a total 1,080 responses.

Ready for the DOL?

Advisors rate their firms on how well they've helped advisors prepare for the Dept. of Labor's fiduciary rule (1=unacceptable 10=outstanding).



**ABOUT WEALTH
MANAGEMENT'S
INDEPENDENT BROKER-
DEALER REPORT CARD**

Now in its 7th year, Wealth Management Magazine compiles its annual Independent Broker-Dealer Report Card rankings. The publication asks affiliated brokers to rate their broker-dealer on several items including support, products, compliance and technology.

Independent Financial Group has consistently ranked in the top 5 each year among all independent broker-dealers, nationwide.