

Response date	Main rating	Main open-ended	Checkbox	Rating category	Survey channel	Metric	Antivirus suspicion
Fri Apr 21 2023 16:04:53 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS	
Wed Mar 08 2023 23:09:34 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS	
Mon May 08 2023 21:32:33 GMT+0000 (Coordinated Universal Time)	10	1. Friendly, competent, loyal, professional		Positive	email	NPS	
Tue Mar 28 2023 13:24:28 GMT+0000 (Coordinated Universal Time)	10	2. Sorry, no complaints :)	FALSE	Positive	email	NPS	
Tue Feb 07 2023 16:48:33 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS	
Thu Apr 20 2023 15:32:21 GMT+0000 (Coordinated Universal Time)	10	Personal contact with advisor		Positive	email	NPS	
Wed Jul 12 2023 23:55:40 GMT+0000 (Coordinated Universal Time)	9	TaxStrategies	FALSE	Positive	email	NPS	
Tue May 30 2023 23:40:50 GMT+0000 (Coordinated Universal Time)	10	Stability. Maintain a stable base of highly qualified staff who continually monitor's and react quickly to changing markets.	FALSE	Positive	email	NPS	
Sat Jan 21 2023 16:31:03 GMT+0000 (Coordinated Universal Time)	10	The relationships and the active overwatch on our account	FALSE	Positive	email	NPS	
Thu Mar 30 2023 16:33:01 GMT+0000 (Coordinated Universal Time)	10	Service I have received for the past 18 years. Great personal service.	FALSE	Positive	email	NPS	
Tue Nov 01 2022 01:53:04 GMT+0000 (Coordinated Universal Time)							
Mon Mar 27 2023 20:32:08 GMT+0000 (Coordinated Universal Time)	10	I don't know. Perhaps adjust portfolio more tactically to adjust to rapidly changing market conditions? We've been with Smith Anglin for nearly 20 years now and are pretty set in the management of our portfolio, but still would enjoy that personal touch upon occasion with our trusted advisor.	FALSE	Positive	email	NPS	
Tue Feb 21 2023 12:29:42 GMT+0000 (Coordinated Universal Time)	9		FALSE	Positive	email	NPS	
Wed Apr 26 2023 20:24:09 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS	
Sun Apr 02 2023 12:53:35 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS	
Wed Mar 15 2023 15:51:58 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS	
		My advisor is always available to answer my questions and keeps me in the loop on our retirement goals. Never any pressure to take on more than what we're comfortable with. I truly feel Roger has our best interests/goals in mind and I feel very confident and comfortable with his financial expertise and recommendations.	FALSE	Positive	email	NPS	
Tue Dec 06 2022 16:38:15 GMT+0000 (Coordinated Universal Time)	10		FALSE	Positive	email	NPS	
Tue Dec 06 2022 09:55:53 GMT+0000 (Coordinated Universal Time)	10		FALSE	Positive	email	NPS	
Mon Nov 07 2022 02:07:52 GMT+0000 (Coordinated Universal Time)	10	I think Steve, Rex, Chris and Wes always look out for us. I trust them totally with our investments!	FALSE	Positive	email	NPS	
Tue Feb 21 2023 22:53:46 GMT+0000 (Coordinated Universal Time)	10	SMITH ANGLIN IS A GREAT COMPANY AND DO A GREAT JOB HELPING THEIR CLIENT AND HAVE DONE A GREAT JOB WITH OUR INVESTMENTS	FALSE	Positive	email	NPS	
Mon May 01 2023 23:29:50 GMT+0000 (Coordinated Universal Time)	8		FALSE	Neutral	email	NPS	
Fri Nov 11 2022 21:36:22 GMT+0000 (Coordinated Universal Time)	10	Attention to detail and the desire to help when contacted.	FALSE	Positive	email	NPS	
Thu Jan 05 2023 16:04:55 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS	
Fri Apr 07 2023 17:36:17 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS	
Thu May 18 2023 22:48:35 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS	
Tue Dec 13 2022 16:20:45 GMT+0000 (Coordinated Universal Time)	10	1. The detailed planning that meets my goals based upon my situation. Also the accurate implementation of the plan.		Positive	email	NPS	
Tue Mar 28 2023 21:02:00 GMT+0000 (Coordinated Universal Time)	10	2. Nothing comes to mind.	FALSE	Positive	email	NPS	
Wed Jan 11 2023 19:16:37 GMT+0000 (Coordinated Universal Time)	8			Neutral	email	NPS	
Thu Dec 08 2022 19:09:15 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS	
Tue Dec 13 2022 22:03:19 GMT+0000 (Coordinated Universal Time)	5			Negative	email	NPS	
Wed Nov 09 2022 00:28:31 GMT+0000 (Coordinated Universal Time)	10	1. The personal touch that your staff provides.	FALSE	Positive	email	NPS	
Sat Feb 18 2023 19:05:55 GMT+0000 (Coordinated Universal Time)	10	2. I have nothing to add at this point. Great Job!	FALSE	Positive	email	NPS	
Wed Jan 25 2023 23:31:44 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS	
Fri Nov 18 2022 21:39:35 GMT+0000 (Coordinated Universal Time)	7	I need to wait and see my losses and if tgey were minimized.	FALSE	Neutral	email	NPS	
Wed Dec 14 2022 18:39:35 GMT+0000 (Coordinated Universal Time)	10	It's honesty and strong values..	FALSE	Positive	email	NPS	

Fri Oct 28 2022 17:49:19 GMT+0000 (Coordinated Universal Time)	10 Trustworthy! Honest, compassionate and informative service.	FALSE	Positive	email	NPS
Thu Mar 30 2023 19:51:40 GMT+0000 (Coordinated Universal Time)	10 No suggestion, as I am thoroughly satisfied.	FALSE	Positive	email	NPS
Fri Jan 27 2023 17:05:22 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Wed Jan 18 2023 19:14:42 GMT+0000 (Coordinated Universal Time)	10 Personal service and time spent reviewing accounts..	FALSE	Positive	email	NPS
Fri May 26 2023 02:42:42 GMT+0000 (Coordinated Universal Time)	8		Neutral	email	NPS
Fri Apr 21 2023 15:43:26 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Fri Mar 10 2023 17:20:31 GMT+0000 (Coordinated Universal Time)	1) Quick responses to questions and requests for processing of stock gifts. 2) Can't think of anything The service I receive when I call for help or information is always top notch! I think, to help those of us who spend too much per year, ways to cut our spending and get	FALSE	Positive	email	NPS
Thu Oct 26 2023 19:09:17 GMT+0000 (Coordinated Universal Time)	10 out of debt.	FALSE	Positive	email	NPS
Mon Oct 31 2022 15:29:09 GMT+0000 (Coordinated Universal Time)	3 Consistency	FALSE	Negative	email	NPS
Wed Jan 18 2023 13:02:43 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Tue Apr 04 2023 11:26:17 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Tue Mar 14 2023 16:40:26 GMT+0000 (Coordinated Universal Time)	10 Expert personal and personal service.	FALSE	Positive	email	NPS
Fri Mar 10 2023 05:02:49 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Fri Apr 07 2023 21:46:54 GMT+0000 (Coordinated Universal Time)	9		Positive	email	NPS
Mon Jun 19 2023 15:34:08 GMT+0000 (Coordinated Universal Time)	10 The quick and professional response to all of our questions and concerns.	FALSE	Positive	email	NPS
Mon Jun 12 2023 22:12:33 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Mon Mar 20 2023 20:11:11 GMT+0000 (Coordinated Universal Time)	8 Stay away from garbage like ARKK.	FALSE	Neutral	email	NPS
Thu Jan 05 2023 23:27:25 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Mon May 08 2023 18:05:41 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Tue Oct 24 2023 18:53:23 GMT+0000 (Coordinated Universal Time)	10 The excellent customer service, outstanding communication, and accessibility to my		Positive	email	NPS
Fri Nov 11 2022 17:50:42 GMT+0000 (Coordinated Universal Time)	10 Advisor when questions arise.	FALSE	Positive	email	NPS
Tue Nov 15 2022 16:23:31 GMT+0000 (Coordinated Universal Time)	10 Feel a relationship with all the partners and the team they have. Personal service, keeping us updated on the state of the economy and providing	FALSE	Positive	email	NPS
Wed Nov 16 2022 13:08:14 GMT+0000 (Coordinated Universal Time)	10 some definition of what the future might look like.	FALSE	Positive	email	NPS
Fri Nov 18 2022 16:24:05 GMT+0000 (Coordinated Universal Time)	10 Staying in touch . 1. I value their good judgement in managing our portfolio and their excellent communication about the strategy.	FALSE	Positive	email	NPS
Fri May 19 2023 21:57:57 GMT+0000 (Coordinated Universal Time)	10 2. Get better returns!	FALSE	Positive	email	NPS
Fri Jan 20 2023 17:06:36 GMT+0000 (Coordinated Universal Time)	10 You are easily available and I like your investment strategy. Ongoing and Personal attention to my life situation. Great proactive suggestions and immediate assistance with any new issues. I really appreciate that any time I talk with my advisor he has done his research and is up to speed to answer all my	FALSE	Positive	email	NPS
Sat Dec 10 2022 15:01:40 GMT+0000 (Coordinated Universal Time)	10 questions.	FALSE	Positive	email	NPS
Thu Oct 26 2023 20:30:22 GMT+0000 (Coordinated Universal Time)	10 Personal attention	FALSE	Positive	email	NPS
Fri Mar 24 2023 16:41:01 GMT+0000 (Coordinated Universal Time)	10 1. Managing our retirement portfolio.	FALSE	Positive	email	NPS
Thu Mar 30 2023 14:19:51 GMT+0000 (Coordinated Universal Time)	9 Available communication is always there. Truly impressed with the expertise.	FALSE	Positive	email	NPS
Thu Nov 03 2022 18:27:45 GMT+0000 (Coordinated Universal Time)	10 Expertise, friendliness, timely and frequent communication	FALSE	Positive	email	NPS
Thu Jan 05 2023 16:12:23 GMT+0000 (Coordinated Universal Time)	9		Positive	email	NPS
Mon Nov 28 2022 20:39:06 GMT+0000 (Coordinated Universal Time)	10 Response and support from the associates.	FALSE	Positive	email	NPS
Fri Jun 23 2023 16:44:24 GMT+0000 (Coordinated Universal Time)	10 Trust worthy	FALSE	Positive	email	NPS
Fri May 12 2023 01:00:41 GMT+0000 (Coordinated Universal Time)	8		Neutral	email	NPS
Thu Oct 26 2023 22:30:41 GMT+0000 (Coordinated Universal Time)	8		Neutral	email	NPS
Tue Apr 25 2023 17:32:29 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Mon Sep 18 2023 21:44:58 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Wed Apr 12 2023 03:11:05 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Thu Jan 12 2023 17:15:04 GMT+0000 (Coordinated Universal Time)	1. Personal Service. Software tools you use to project the success of my goals. 2. Can't think of anything Peace of mind that the correct thing is being done with my retirement.	FALSE	Positive	email	NPS
Tue Feb 28 2023 16:50:22 GMT+0000 (Coordinated Universal Time)	Maybe quarterly updates on my account and what is being done specifically to 10 maximize my return.	FALSE	Positive	email	NPS

Tue Feb 21 2023 13:59:04 GMT+0000 (Coordinated Universal Time)	10 Roger Meadors is absolutely the best.. He always goes above and beyond for me and my wife! 1. The interactions with SA are more personal and bespoke, not treating me as in aggregate type of investor group (i.e, he's moderate risk investor, lets do this...)  2. Continue to have regularly scheduled calls on a monthly or every other month basis.	FALSE	Positive	email	NPS
Thu Apr 20 2023 15:53:18 GMT+0000 (Coordinated Universal Time)	10	FALSE	Positive	email	NPS
Sat Dec 16 2022 18:44:57 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Fri Jan 27 2023 23:27:54 GMT+0000 (Coordinated Universal Time)	9 Trust		Positive	email	NPS
Fri Oct 27 2023 17:08:58 GMT+0000 (Coordinated Universal Time)	10 I have no suggestion for improvement. We are very satisfied	FALSE	Positive	email	NPS
Wed Oct 25 2023 14:21:18 GMT+0000 (Coordinated Universal Time)	10 Proper communication and more responsive to markets with a proper plan not to lose my life savings	FALSE	Positive	email	NPS
Fri Jan 13 2023 16:26:04 GMT+0000 (Coordinated Universal Time)	4	FALSE	Negative	email	NPS
Sat Mar 11 2023 04:32:24 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Fri Mar 17 2023 15:53:51 GMT+0000 (Coordinated Universal Time)	10 1. piece of mind knowing someone more experienced then myself is watching the market and protecting my wealth. 2. maybe recommendations for myself to research.	FALSE	Positive	email	NPS
Fri Apr 14 2023 15:18:58 GMT+0000 (Coordinated Universal Time)	9 2. maybe recommendations for myself to research.	FALSE	Positive	email	NPS
Fri Apr 14 2023 02:48:29 GMT+0000 (Coordinated Universal Time)	10 You are doing a great job. THANK YOU!	FALSE	Positive	email	NPS
Sat Jan 14 2023 03:46:24 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Wed Nov 16 2022 18:34:52 GMT+0000 (Coordinated Universal Time)	9		Positive	email	NPS
Tue Oct 24 2023 20:33:29 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Wed Jul 05 2023 15:14:20 GMT+0000 (Coordinated Universal Time)	10 1. Trust	FALSE	Positive	email	NPS
Thu Nov 03 2022 11:31:30 GMT+0000 (Coordinated Universal Time)	10 Keeping it personal, and individually customized. First, account managers expertise and knowledge of the markets. Second, their quick response to requests and questions about my account.	FALSE	Positive	email	NPS
Tue Nov 15 2022 18:37:12 GMT+0000 (Coordinated Universal Time)	10	FALSE	Positive	email	NPS
Fri Mar 03 2023 18:02:34 GMT+0000 (Coordinated Universal Time)	9		Positive	email	NPS
Thu Aug 24 2023 20:20:03 GMT+0000 (Coordinated Universal Time)	10 The information that we need as we come close to retirement. 1) Good communication	FALSE	Positive	email	NPS
Sun Feb 26 2023 23:32:56 GMT+0000 (Coordinated Universal Time)	10 2) Not sure that I can think of anything.	FALSE	Positive	email	NPS
Sun Apr 23 2023 00:39:47 GMT+0000 (Coordinated Universal Time)	9		Positive	email	NPS
Mon Sep 25 2023 17:15:50 GMT+0000 (Coordinated Universal Time)	10 Very happy	FALSE	Positive	email	NPS
Mon May 08 2023 23:10:02 GMT+0000 (Coordinated Universal Time)	10 I appreciate the periodic update calls.  One thing I think would be useful is an overview of performance. Nothing technical just a 1000 foot overview. For example:  If I started with \$500,000 last year. It would be nice to know what my total is now. I am aware that can be found in the statements but it takes some time to dig out. I want to be able to quickly see my status. Perhaps a note where it primarily came from and what didn't do well. Same thought process, how would I have done if all money was in money market? And what would perform have been if I stayed with investments prior to Smith Anglin.	FALSE	Positive	email	NPS
Tue Oct 10 2023 19:50:03 GMT+0000 (Coordinated Universal Time)	10 1. Very personal	FALSE	Positive	email	NPS
Thu Jan 12 2023 18:47:56 GMT+0000 (Coordinated Universal Time)	10 2. Nothing	FALSE	Positive	email	NPS
Thu Dec 15 2022 20:56:26 GMT+0000 (Coordinated Universal Time)	9		Positive	email	NPS
Fri Nov 18 2022 03:43:20 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Wed Feb 22 2023 16:52:39 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Thu Apr 06 2023 23:55:21 GMT+0000 (Coordinated Universal Time)	9		Positive	email	NPS
Tue Mar 21 2023 20:03:32 GMT+0000 (Coordinated Universal Time)	9		Positive	email	NPS

Mon Mar 27 2023 17:37:38 GMT+0000 (Coordinated Universal Time)	7 I am not certain asset allocation is tailored to the individual accounts.	FALSE	Neutral	email	NPS
Mon Apr 17 2023 23:32:29 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Tue Feb 21 2023 00:48:51 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Thu Nov 10 2022 19:19:58 GMT+0000 (Coordinated Universal Time)	10	FALSE	Positive	email	NPS
Fri Mar 17 2023 20:48:50 GMT+0000 (Coordinated Universal Time)	9 Build an in-house scoreboard app that is similar to the TD/Schwab apps, but more personalized with text message board, manual input options, merged "other" investments, stock ticker, and other such options... that can be personalized by the		Positive	email	NPS
Thu Jan 26 2023 19:59:08 GMT+0000 (Coordinated Universal Time)	8 customer.	FALSE	Neutral	email	NPS
Fri Nov 04 2022 16:10:01 GMT+0000 (Coordinated Universal Time)	10 Excellent communication and availability. We really appreciate Roger.	FALSE	Positive	email	NPS
Thu Apr 13 2023 16:31:23 GMT+0000 (Coordinated Universal Time)	10 Trust	FALSE	Positive	email	NPS
Thu Mar 30 2023 22:08:47 GMT+0000 (Coordinated Universal Time)	9		Positive	email	NPS
Sat Oct 28 2023 00:33:25 GMT+0000 (Coordinated Universal Time)	8 1. Outcomes, information contained in newsletters is helpful, approachability of all staff		Neutral	email	NPS
Mon Jun 12 2023 22:23:14 GMT+0000 (Coordinated Universal Time)	10 2. Nothing, weâ€™re very satisfied Having direct communication with my adviser, Dan Drummond. He is always there to answer questions. This is my first experience with a financial manager so I don't	FALSE	Positive	email	NPS
Thu Mar 02 2023 00:20:22 GMT+0000 (Coordinated Universal Time)	10 have any input on how to do anything better.	FALSE	Positive	email	NPS
Wed Jan 18 2023 19:48:31 GMT+0000 (Coordinated Universal Time)	10 relationship between client and my financial advisors I value your financial expertise. You are professionals helping an amateur.	FALSE	Positive	email	NPS
Fri Apr 21 2023 17:56:39 GMT+0000 (Coordinated Universal Time)	10 Triple my investments. 1. It takes a lot of stressing out of my day.	FALSE	Positive	email	NPS
Fri Jan 20 2023 21:47:22 GMT+0000 (Coordinated Universal Time)	10 2. I'm good. I think Spencer does a good job	FALSE	Positive	email	NPS
Tue Jan 03 2023 16:43:41 GMT+0000 (Coordinated Universal Time)	10 Good management, low fees	FALSE	Positive	email	NPS
Mon Dec 12 2022 21:59:03 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Wed Mar 29 2023 17:51:53 GMT+0000 (Coordinated Universal Time)	9 I enjoy the timeliness response to needs and questions, and the time taken to thoroughly explain and make sure I understand what is being done with my financial		Positive	email	NPS
Sat Mar 11 2023 13:28:05 GMT+0000 (Coordinated Universal Time)	10 investments. I wish the account access on mobile device was better. Having the expertise to guide my investment through uncertain economic times.	FALSE	Positive	email	NPS
Thu Apr 20 2023 16:09:47 GMT+0000 (Coordinated Universal Time)	10 Being sound fundamentally in investment judgements.	FALSE	Positive	email	NPS
Wed May 10 2023 17:02:00 GMT+0000 (Coordinated Universal Time)	7 1. Personal contact you have with your clients.		Neutral	email	NPS
Mon Apr 10 2023 20:33:02 GMT+0000 (Coordinated Universal Time)	2. Help us set up a computer login to view Jeannie's Roth IRA that was converted				
Thu Oct 26 2023 22:26:56 GMT+0000 (Coordinated Universal Time)	10 last year.	FALSE	Positive	email	NPS
Fri Feb 24 2023 03:56:01 GMT+0000 (Coordinated Universal Time)	9		Positive	email	NPS
Mon Feb 20 2023 17:35:38 GMT+0000 (Coordinated Universal Time)	10 Steve, I can't think of anything to improve my service. Everything is good.	FALSE	Positive	email	NPS
Sat Apr 15 2023 16:08:07 GMT+0000 (Coordinated Universal Time)	8 At this point it's a question of time and the outcome of our shared experience.	FALSE	Neutral	email	NPS
Fri Mar 31 2023 18:21:49 GMT+0000 (Coordinated Universal Time)	10 The oversight of my advisor, the questions he asks to be ready to meet needs for special expenditures, his expertise in choosing the best investment choice, the knowledge of the entire team about the economy in general and how it affects each		Positive	email	NPS
Tue Jan 31 2023 18:57:09 GMT+0000 (Coordinated Universal Time)	10 individual client.	FALSE	Positive	email	NPS
Wed Jan 11 2023 17:52:40 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Mon Dec 19 2022 17:34:43 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Wed Nov 09 2022 16:50:54 GMT+0000 (Coordinated Universal Time)	10	FALSE	Positive	email	NPS
Tue Nov 15 2022 16:16:34 GMT+0000 (Coordinated Universal Time)	9 Prompt attention to requests Great explanation of investment strategies and how they apply to my situation. I	FALSE	Positive	email	NPS
Fri Apr 28 2023 15:46:31 GMT+0000 (Coordinated Universal Time)	10 appreciate the one on one with my investment rep.	FALSE	Positive	email	NPS
Tue Oct 24 2023 16:26:17 GMT+0000 (Coordinated Universal Time)	10 I like that you manage the mix of investments. 1. Always available to answer my questions	FALSE	Positive	email	NPS
Thu Oct 26 2023 18:39:08 GMT+0000 (Coordinated Universal Time)	9 2. Knowledgeable	FALSE	Positive	email	NPS
Mon Dec 12 2022 17:06:40 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS

Wed Jan 25 2023 22:23:35 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS	
Tue Jul 18 2023 19:38:20 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS	
Tue Apr 04 2023 16:01:17 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS	
Fri Feb 03 2023 04:55:28 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS	
		I value being able to rely on your firm's sound track record to manage my retirement account. The one thing that I would like see going forward is to receive an email notification when your firm's management fee is withdrawn from my account.	FALSE	Positive	email	NPS
Mon May 01 2023 22:25:33 GMT+0000 (Coordinated Universal Time)	10	Personal service	FALSE	Positive	email	NPS
Thu Feb 09 2023 17:37:11 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Tue Apr 25 2023 17:16:33 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Mon Nov 14 2022 22:00:41 GMT+0000 (Coordinated Universal Time)	10		FALSE	Positive	email	NPS
Sun Jan 08 2023 05:21:46 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
		I would like more interaction from the advisor on where the current model is and how it relates to me. Also a more detailed explanation of what the investments are and how they fit into the plan.	FALSE	Positive	email	NPS
Thu May 25 2023 17:16:59 GMT+0000 (Coordinated Universal Time)	10	Taxes completed using opportunities to provide savings when possible and getting advice for going forward.	FALSE	Positive	email	NPS
Fri Dec 16 2022 21:30:56 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Wed May 03 2023 00:58:07 GMT+0000 (Coordinated Universal Time)	9			Positive	email	NPS
Wed May 03 2023 17:04:26 GMT+0000 (Coordinated Universal Time)	8			Neutral	email	NPS
Tue Oct 24 2023 18:28:00 GMT+0000 (Coordinated Universal Time)		They continually monitor trends and my risk tolerance to grow yet preserve my assets.	FALSE	Positive	email	NPS
Thu Apr 06 2023 20:09:23 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Fri Feb 24 2023 21:50:49 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Wed May 17 2023 18:28:03 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Sat Feb 25 2023 19:15:14 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Fri Dec 09 2022 20:49:59 GMT+0000 (Coordinated Universal Time)	10	The expert knowledge and the human contact and caring	FALSE	Positive	email	NPS
Wed Nov 30 2022 19:57:34 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
		You have been taking care of our family for years. Everything you do for us is AWESOME!				
Wed Mar 15 2023 15:19:41 GMT+0000 (Coordinated Universal Time)	10	THANKS	FALSE	Positive	email	NPS
		No ideas. It is impossible to be objective. Hank and I go way back, so having a friend that you know you can rely on and that will communicate with you at any time day or night is priceless.	FALSE	Positive	email	NPS
Thu Mar 09 2023 19:18:51 GMT+0000 (Coordinated Universal Time)	10	Great customer service. Dan Drummond always returns my calls promptly. Also, I like S.A.'s philosophy of avoiding the latest "flash in the pan" investments and sticking to tried and true funds.	FALSE	Positive	email	NPS
Wed Dec 07 2022 18:51:50 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Tue Jan 31 2023 22:49:06 GMT+0000 (Coordinated Universal Time)	10	Trust	FALSE	Positive	email	NPS
Fri Oct 28 2022 21:18:12 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Wed Apr 05 2023 00:01:04 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Fri Dec 16 2022 17:05:49 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Tue Apr 11 2023 15:50:20 GMT+0000 (Coordinated Universal Time)	10	Nothing! You provide excellent service.	FALSE	Positive	email	NPS
		Knowing the people. I like the fact that Valerie and I know Steve or Weston, for example, as that makes our relationship personal.	FALSE	Positive	email	NPS
Mon Mar 20 2023 16:47:54 GMT+0000 (Coordinated Universal Time)	9	Long term and personal relationship with my advisor. David knows me and my habits and helps me carefully navigate my financial well being. The staff is always pleasant and helpful. So lucky to have been introduced to the firm.	FALSE	Positive	email	NPS
Mon Dec 19 2022 19:28:21 GMT+0000 (Coordinated Universal Time)	10	That you do what I ask you to do, not what you think I ought to do	FALSE	Positive	email	NPS
Fri Mar 31 2023 19:37:50 GMT+0000 (Coordinated Universal Time)	9	One on one relationship with financial advisors.				
Mon Apr 10 2023 15:16:59 GMT+0000 (Coordinated Universal Time)	10	Written explanation of what the app is telling me so I can refer back to it.	FALSE	Positive	email	NPS
Thu Jan 19 2023 17:09:36 GMT+0000 (Coordinated Universal Time)	0			Negative	email	NPS
		1. Capital Preservation				
Thu Mar 30 2023 22:15:12 GMT+0000 (Coordinated Universal Time)	9	2. Communications are good... but can always be improved.	FALSE	Positive	email	NPS
Tue Feb 21 2023 05:12:07 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Mon Oct 23 2023 17:20:34 GMT+0000 (Coordinated Universal Time)	10	Great service.	FALSE	Positive	email	NPS
Wed Feb 01 2023 18:38:37 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Wed Dec 21 2022 01:19:33 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS

Tue Nov 01 2022 16:38:14 GMT+0000 (Coordinated Universal Time)	9	What I value most is the personal touch we feel we are given and the availability of our advisor.	FALSE	Positive	email	NPS
Thu Jan 05 2023 18:54:56 GMT+0000 (Coordinated Universal Time)	10	I can't think of any improvements!	FALSE	Positive	email	NPS
Wed Apr 12 2023 17:52:01 GMT+0000 (Coordinated Universal Time)	10	Excellent, personal service. Active management and oversight of portfolio.	FALSE	Positive	email	NPS
Tue Jan 31 2023 17:13:04 GMT+0000 (Coordinated Universal Time)	10	More Grizzly game get togethers in Memphis (Just kidding!)	FALSE	Positive	email	NPS
Fri Jan 20 2023 17:33:52 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Tue Jan 31 2023 18:35:49 GMT+0000 (Coordinated Universal Time)	8	Truly not sure! Yawl do an excellent job!	FALSE	Neutral	email	NPS
Tue May 02 2023 16:08:57 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Sun Mar 05 2023 01:49:50 GMT+0000 (Coordinated Universal Time)	9	I really like my advisor, Hank Mulvihill. He responds quickly to any questions I may have and is always willing to offer a detailed explanation on the thought process behind his recommendations.	FALSE	Positive	email	NPS
Wed Jan 11 2023 16:25:45 GMT+0000 (Coordinated Universal Time)	10	Nothing! Y'all are fantastic.	FALSE	Positive	email	NPS
Mon Nov 14 2022 18:49:43 GMT+0000 (Coordinated Universal Time)	10	Confidence	FALSE	Positive	email	NPS
Fri Nov 04 2022 18:18:02 GMT+0000 (Coordinated Universal Time)	10		FALSE	Positive	email	NPS
Wed Mar 15 2023 17:59:29 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Thu Jun 29 2023 17:41:11 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Tue Aug 29 2023 13:30:41 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Tue Jun 20 2023 16:05:01 GMT+0000 (Coordinated Universal Time)	10	Confidence in your attention to my financial needs. Accessibility.	FALSE	Positive	email	NPS
Wed May 24 2023 10:40:36 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Tue Apr 04 2023 02:24:18 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Wed Dec 07 2022 17:09:54 GMT+0000 (Coordinated Universal Time)	10	Easy to work with, knowable about airline pay and retirement.	FALSE	Positive	email	NPS
Tue Dec 13 2022 06:30:27 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Tue Feb 28 2023 22:21:14 GMT+0000 (Coordinated Universal Time)	9	I would like to see a breakdown of my costs on the web site.	FALSE	Positive	email	NPS
Mon Sep 11 2023 18:15:43 GMT+0000 (Coordinated Universal Time)	8	I haven't been with you for a year yet, so I don't have an opinion yet.	FALSE	Neutral	email	NPS
Tue Nov 01 2022 16:04:56 GMT+0000 (Coordinated Universal Time)	10	Honesty I value the expertise of the financial managers to safely manage our portfolio.	FALSE	Positive	email	NPS
Thu Jan 26 2023 18:52:14 GMT+0000 (Coordinated Universal Time)	10	More frequent one on one communication would be helpful.	FALSE	Positive	email	NPS
Mon Mar 06 2023 22:13:19 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Thu Mar 30 2023 16:15:05 GMT+0000 (Coordinated Universal Time)	10	Personalized service. Like family. Keep on doing what you have been doing. Thanks for the help.	FALSE	Positive	email	NPS
Fri Jan 06 2023 19:01:24 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Wed Nov 02 2022 01:22:18 GMT+0000 (Coordinated Universal Time)	10		FALSE	Positive	email	NPS
Wed Dec 14 2022 23:09:10 GMT+0000 (Coordinated Universal Time)	10	Quiet professionalism and outstanding customer service.	FALSE	Positive	email	NPS
Fri Feb 03 2023 00:54:03 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Wed Feb 01 2023 16:47:00 GMT+0000 (Coordinated Universal Time)	9			Positive	email	NPS
Mon Mar 20 2023 13:08:04 GMT+0000 (Coordinated Universal Time)	4			Negative	email	NPS
Fri Jan 06 2023 16:47:50 GMT+0000 (Coordinated Universal Time)	4	I haven't heard from my advisor.	FALSE	Negative	email	NPS
Thu Mar 30 2023 14:49:19 GMT+0000 (Coordinated Universal Time)	10	You guys are so good and I don't deserve to be with you. Thank you for all you do.	FALSE	Positive	email	NPS
Fri May 05 2023 22:35:38 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Sat Apr 29 2023 00:43:15 GMT+0000 (Coordinated Universal Time)	10	Integrity. More events in the big member cities, not just Dallas. Discussions about annuities and investment opportunities/options.	FALSE	Positive	email	NPS
Mon Oct 23 2023 22:38:58 GMT+0000 (Coordinated Universal Time)	6	When told a follow up call will take place, it rarely happens.	FALSE	Negative	email	NPS
Thu Feb 23 2023 16:54:47 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Mon Oct 23 2023 16:46:08 GMT+0000 (Coordinated Universal Time)	10			Positive	email	NPS
Thu Jan 05 2023 01:46:39 GMT+0000 (Coordinated Universal Time)	8			Neutral	email	NPS
Tue May 02 2023 18:14:24 GMT+0000 (Coordinated Universal Time)	10	Good Customer Service 1.Take a load off my mind.	FALSE	Positive	email	NPS
Tue May 02 2023 15:18:13 GMT+0000 (Coordinated Universal Time)	9	2.Monthly reminders to check my account.	FALSE	Positive	email	NPS
Thu Feb 23 2023 02:34:29 GMT+0000 (Coordinated Universal Time)	9			Positive	email	NPS

	availability to discuss my issues				
Thu Oct 26 2023 15:54:37 GMT+0000 (Coordinated Universal Time)	10 no need to change anything	FALSE	Positive	email	NPS
Fri Mar 24 2023 15:31:32 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Thu Mar 02 2023 21:16:14 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
	I appreciate the quarterly communication with my advisor and that he has taken the time to get to me know me a bit.				
Tue Oct 24 2023 07:56:39 GMT+0000 (Coordinated Universal Time)	10 Can't think of anything I'd improve at this time. Availability of senior leadership	FALSE	Positive	email	NPS
Wed Jun 21 2023 18:17:50 GMT+0000 (Coordinated Universal Time)	10 I can't think of anything.	FALSE	Positive	email	NPS
Wed Apr 05 2023 00:36:03 GMT+0000 (Coordinated Universal Time)	10 Communication	FALSE	Positive	email	NPS
	1. Learned response to queries as to why account seems to stumble and sometimes stagger.				
Tue Feb 14 2023 17:34:17 GMT+0000 (Coordinated Universal Time)	9 2. Maintain client contact when the market is struggling.	FALSE	Positive	email	NPS
Fri Nov 18 2022 18:06:52 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
	1. Personalized service from our Advisor, Roger Meadors.				
	2. As S.A. already provides tax services it would be helpful to add Trust, Will and				
Thu Apr 20 2023 23:33:05 GMT+0000 (Coordinated Universal Time)	10 Estate planning to simplify and have all of these under one umbrella.	FALSE	Positive	email	NPS
Wed Dec 14 2022 17:10:47 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Wed Mar 08 2023 16:12:02 GMT+0000 (Coordinated Universal Time)	10 My association with Chris Lott is very important to me.	FALSE	Positive	email	NPS
Wed Nov 16 2022 18:40:18 GMT+0000 (Coordinated Universal Time)	9 It's balanced approach - staying the course in up and down markets.	FALSE	Positive	email	NPS
Wed Mar 29 2023 16:06:12 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Thu Jan 05 2023 17:41:12 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Tue Dec 13 2022 17:01:19 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Tue Dec 06 2022 06:33:48 GMT+0000 (Coordinated Universal Time)	5		Negative	email	NPS
Tue Feb 28 2023 19:02:14 GMT+0000 (Coordinated Universal Time)	4 Account is losing money and no advise over the year	FALSE	Negative	email	NPS
Wed Dec 07 2022 00:10:47 GMT+0000 (Coordinated Universal Time)	8		Neutral	email	NPS
Wed May 10 2023 22:58:03 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Mon May 22 2023 14:10:40 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
	<p>Hello Steve and thank you for requesting feedback in order to improve your firm. I have put a lot of thought into my numbered answer and as much as I would love to give you a better rating, I am reluctant to do so with all honesty. As you know, I put a lot of faith in your organization and after carefully listening to all the facts, I made the decision to move forward with Smith-Anglin. My first planner left your firm and in my opinion, did not look after MY best interest. Then my current planner was selected and it has been a bit of a rocky road. As much as I would like to say I will continue using your firm, I honestly can not at this time. Things have improved and I hope they will continue to improve but I am still reluctant to ask questions based on my past experiences. I really hope this changes because to me a great planner breaks down the complicated details into understandable terms that builds confidence, trust and more importantly a great reputation. I am really hoping that this will evolve to that point but right now today, we are not there yet.</p> <p>My first experience with your tax personnel was exceptional! Everyone in that department was very knowledgeable, helpful and professional. It was a very enjoyable experience.</p> <p>I hope I can mark a 10 on your next feedback request! Thanks for taking the time</p>				
Sun Apr 30 2023 02:01:40 GMT+0000 (Coordinated Universal Time)	6 and effort to listen to your customers concerns.	FALSE	Negative	email	NPS
Tue Feb 28 2023 18:58:01 GMT+0000 (Coordinated Universal Time)	10 Peace of mind that my portfolio is being well managed.	FALSE	Positive	email	NPS
Thu Mar 02 2023 19:26:14 GMT+0000 (Coordinated Universal Time)	8		Neutral	email	NPS
Mon May 01 2023 16:24:45 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS

Availability when needed.  
Listen to my needs.

Fri Apr 07 2023 16:57:33 GMT+0000 (Coordinated Universal Time)	10 No improvement needed	FALSE	Positive	email	NPS
Tue Nov 29 2022 11:26:28 GMT+0000 (Coordinated Universal Time)	10 Your accessibility. Be more proactive at profit taking. Not sure we can count on steady growth over 7 time like we used to. Gotta get it when we can in todays world	FALSE	Positive	email	NPS
Thu Jan 26 2023 20:19:53 GMT+0000 (Coordinated Universal Time)	7	FALSE	Neutral	email	NPS
Thu May 04 2023 17:47:09 GMT+0000 (Coordinated Universal Time)	7 Prompt, helpful, answers all my questions and always answers calls quickly. These 9 are difficult times and accounts not performing well, but .....	FALSE	Neutral	email	NPS
Wed Nov 30 2022 17:37:17 GMT+0000 (Coordinated Universal Time)	9	FALSE	Positive	email	NPS
Fri Apr 14 2023 19:16:59 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Thu Nov 10 2022 21:29:16 GMT+0000 (Coordinated Universal Time)	10	FALSE	Positive	email	NPS
Tue Jan 17 2023 19:38:16 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Wed Jan 11 2023 21:36:44 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Mon Mar 13 2023 23:30:19 GMT+0000 (Coordinated Universal Time)	10 Lower prices for tax service. 1. Honesty and professionalism.	FALSE	Positive	email	NPS
Wed May 03 2023 15:49:50 GMT+0000 (Coordinated Universal Time)	10 2. Continue to put customers first.	FALSE	Positive	email	NPS
Thu Feb 16 2023 16:15:04 GMT+0000 (Coordinated Universal Time)	10 1. I like the smaller size of the firm and the one on one communications with my advisor. I also like having access to tax planning, estate planning, ect., all under one roof. Very easy to get questions answered that way.		Positive	email	NPS
Tue Sep 05 2023 20:59:02 GMT+0000 (Coordinated Universal Time)	10 2. Can't think of a thing except lower fees! Lol!	FALSE	Positive	email	NPS
Tue Apr 25 2023 18:26:49 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Wed Dec 07 2022 19:54:47 GMT+0000 (Coordinated Universal Time)	10 Chris Lott, Steve Anglin, and Ronnie Mitchell	FALSE	Positive	email	NPS
Wed May 17 2023 21:28:08 GMT+0000 (Coordinated Universal Time)	2		Negative	email	NPS
Tue Mar 21 2023 19:35:51 GMT+0000 (Coordinated Universal Time)	8		Neutral	email	NPS
Sun May 14 2023 18:31:51 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Thu Jan 19 2023 16:49:54 GMT+0000 (Coordinated Universal Time)	10 That you guys are awesome, especially Jack who always puts me at ease when I have 10 questions and concerns about what is happening in the stock market.	FALSE	Positive	email	NPS
Sun Nov 13 2022 20:00:08 GMT+0000 (Coordinated Universal Time)	9		Positive	email	NPS
Tue Jan 10 2023 18:45:59 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Tue Mar 21 2023 01:22:15 GMT+0000 (Coordinated Universal Time)	10 I always get a quick response to questions	FALSE	Positive	email	NPS
Wed Mar 01 2023 11:48:46 GMT+0000 (Coordinated Universal Time)	10 Not a thing that I can think of. Perfect.	FALSE	Positive	email	NPS
Thu May 11 2023 12:48:30 GMT+0000 (Coordinated Universal Time)	8		Neutral	email	NPS
Wed Apr 26 2023 18:50:13 GMT+0000 (Coordinated Universal Time)	10 The personal contact with Chris, Debbie & tax advice from Ronnie. Good real people 10 that care! THANKS FOR DOING A GREAT JOB!!!!!!!	FALSE	Positive	email	NPS
Thu Mar 23 2023 16:49:36 GMT+0000 (Coordinated Universal Time)	1. Customer service				
Fri Dec 16 2022 18:48:16 GMT+0000 (Coordinated Universal Time)	10 2. ?	FALSE	Positive	email	NPS
Mon Jan 16 2023 00:43:27 GMT+0000 (Coordinated Universal Time)	9		Positive	email	NPS
Thu Apr 27 2023 16:54:59 GMT+0000 (Coordinated Universal Time)	10 Honesty. Performance.	FALSE	Positive	email	NPS
Tue Nov 15 2022 00:12:58 GMT+0000 (Coordinated Universal Time)	10 Attitude, support and knowledge. The entire staff from top to bottom have always been positive, calm and helpful. Important in this environment we are all 10 experiencing.	FALSE	Positive	email	NPS
Wed May 17 2023 13:33:03 GMT+0000 (Coordinated Universal Time)	1. You're fair, honest, and always available for any questions or concerns. Always aware of the markets ups and downs and trying to adjust our portfolio to our advantage.				
Fri Oct 28 2022 23:39:06 GMT+0000 (Coordinated Universal Time)	10 2. I have no complaints, so therefore I have no suggestions for improvement. More personal contact with my financial advisor. It has been five months since 8 anyone has checked in with me.	FALSE	Positive	email	NPS
Tue Apr 04 2023 18:47:05 GMT+0000 (Coordinated Universal Time)		FALSE	Neutral	email	NPS
Wed Nov 09 2022 18:22:15 GMT+0000 (Coordinated Universal Time)					



Wed Feb 15 2023 21:13:27 GMT+0000 (Coordinated Universal Time)	10 Immediate response to any issue or questions I may have.	FALSE	Positive	email	NPS
Wed Mar 08 2023 19:19:35 GMT+0000 (Coordinated Universal Time)	10 Easy to get help from one of their professionals, and I always trust them to make the right decision for me. I mainly deal with Chris Lott and Debbie Selvidge. Both are always very helpful.	FALSE	Positive	email	NPS
Mon May 08 2023 17:41:40 GMT+0000 (Coordinated Universal Time)	7 Dan keeps me informed, I watch the markets through the Fidelity App so I'm happy	FALSE	Neutral	email	NPS
Mon Feb 13 2023 18:10:32 GMT+0000 (Coordinated Universal Time)	10 with that. For now I wouldn't change anything.	FALSE	Positive	email	NPS
Fri Jan 20 2023 13:06:41 GMT+0000 (Coordinated Universal Time)	10 Chris Lott Communication	FALSE	Positive	email	NPS
Thu May 18 2023 16:23:28 GMT+0000 (Coordinated Universal Time)	The credibility of SAA's managers				
Thu Jan 19 2023 16:29:01 GMT+0000 (Coordinated Universal Time)	10 I have nothing to suggest	FALSE	Positive	email	NPS
Sat May 13 2023 01:37:34 GMT+0000 (Coordinated Universal Time)	10 Always there looking out for us.	FALSE	Positive	email	NPS
Mon Oct 31 2022 18:51:17 GMT+0000 (Coordinated Universal Time)	8	FALSE	Neutral	email	NPS
Fri Dec 16 2022 17:34:46 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Mon Mar 06 2023 02:50:33 GMT+0000 (Coordinated Universal Time)	10 1- experience of staff, follow up is great	FALSE	Positive	email	NPS
Mon Mar 13 2023 17:52:49 GMT+0000 (Coordinated Universal Time)	5		Negative	email	NPS
Wed Mar 29 2023 15:17:10 GMT+0000 (Coordinated Universal Time)	10 Professional all the way around. 1. Principals who listen to and seem interested in their clients, who research areas that they are not experts in, are accessible, have a plan but will make tweaks as new conditions arise. All client facing employees make excellent impressions.	FALSE	Positive	email	NPS
Tue May 23 2023 15:50:16 GMT+0000 (Coordinated Universal Time)	9 2. Software that is easier to navigate for old folks!	FALSE	Positive	email	NPS
Thu May 25 2023 14:25:16 GMT+0000 (Coordinated Universal Time)	10 I like the personal attention.	FALSE	Positive	email	NPS
Fri Feb 17 2023 17:04:02 GMT+0000 (Coordinated Universal Time)	9 Personal service from Roger is GREAT! I'm VERY happy with our experience and have nothing I would change.	FALSE	Positive	email	NPS
Fri Mar 31 2023 15:30:25 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Sun May 07 2023 14:12:48 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Thu Feb 16 2023 18:53:08 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Thu Jan 12 2023 16:45:10 GMT+0000 (Coordinated Universal Time)	5		Negative	email	NPS
Wed Feb 08 2023 19:45:45 GMT+0000 (Coordinated Universal Time)	10 Personal communication, professionalism, and expertise.	FALSE	Positive	email	NPS
Sat Aug 05 2023 21:02:48 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Fri May 05 2023 15:58:17 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Mon Apr 24 2023 20:36:17 GMT+0000 (Coordinated Universal Time)	10 everything is perfect! Thanks so much! 1) We like the attention and advice Roger provides. 2) would like to see a "where are we now" in our retirement goals on maybe a quarterly basis.	FALSE	Positive	email	NPS
Thu Mar 09 2023 00:40:16 GMT+0000 (Coordinated Universal Time)	10	FALSE	Positive	email	NPS
Mon Apr 24 2023 16:44:47 GMT+0000 (Coordinated Universal Time)	7 Because we are new clients, we are still processing results and interactions. I am confident the "8" will be a "10" as time and results confirm SA is an excellent partner in our financial future. Thank you!		Neutral	email	NPS
Wed Jan 25 2023 17:48:34 GMT+0000 (Coordinated Universal Time)	8 Karen Parsons	FALSE	Neutral	email	NPS
Wed Jan 18 2023 22:00:26 GMT+0000 (Coordinated Universal Time)	10 1. Ability to protect downside risks by making portfolio adjustments when and where needed.		Positive	email	NPS
Wed Mar 29 2023 17:10:45 GMT+0000 (Coordinated Universal Time)	10 2. Can't think of anything at this time.	FALSE	Positive	email	NPS
Tue Dec 13 2022 17:04:12 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Wed Nov 09 2022 21:37:19 GMT+0000 (Coordinated Universal Time)	6 Love the personal touch.	FALSE	Negative	email	NPS
Mon Sep 11 2023 15:51:23 GMT+0000 (Coordinated Universal Time)	10 No need to change The people I've worked with have been aces! Very helpful and gracious. I had a sense of honesty, too--even when the advice doesn't necessarily benefit	FALSE	Positive	email	NPS
Wed Feb 15 2023 18:01:43 GMT+0000 (Coordinated Universal Time)	10 SmithAnglin. That keeps me as a customer.	FALSE	Positive	email	NPS
Mon May 22 2023 18:21:50 GMT+0000 (Coordinated Universal Time)	0 Over priced	FALSE	Negative	email	NPS
Mon Jul 17 2023 16:08:10 GMT+0000 (Coordinated Universal Time)	9		Positive	email	NPS

Wed Feb 22 2023 16:18:10 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Fri Nov 25 2022 14:11:42 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Sat Apr 08 2023 22:11:51 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Thu May 11 2023 16:03:25 GMT+0000 (Coordinated Universal Time)	9		Positive	email	NPS
Thu Dec 01 2022 16:17:46 GMT+0000 (Coordinated Universal Time)	10 Updates and newsletters We value knowing your staff having met them on various occasions and being able to put faces with those folks who manage our resources. Any questions that arise are always answered in a timely fashion. In short, we value the personal touch that Smith-Anglin brings to our relationship.	FALSE	Positive	email	NPS
Mon Apr 17 2023 18:44:23 GMT+0000 (Coordinated Universal Time)	10 The new system of uploading documents and other information is not very apparent to this old guy. I wonder if Ken Lott (one week older than me) needed help from Chris or am I just not keeping up.	FALSE	Positive	email	NPS
Thu Jan 05 2023 19:34:05 GMT+0000 (Coordinated Universal Time)	10 Earn me about 25% on my investments every year. K I value and trust the feeling that someone is actually looking at our account and making informed and proactive decisions to enable us to ride out a tumultuous market. Roger and David and everyone at Smith Anglin have been great to work with.	FALSE	Positive	email	NPS
Thu Apr 20 2023 20:59:38 GMT+0000 (Coordinated Universal Time)	10 At this time I can't think of anything that needs to be improved. 1. trust and integrity. I can rely on SA to have my best interests at heart. 2. proactively reach out to discuss when the market is dropping significantly vs. waiting for me to call. Improve my returns with less portfolio volatility.	FALSE	Positive	email	NPS
Mon Jan 23 2023 19:46:34 GMT+0000 (Coordinated Universal Time)	10 I don't generally recommend financial advice to people. I pay for it..	FALSE	Neutral	email	NPS
Wed Jan 18 2023 19:57:50 GMT+0000 (Coordinated Universal Time)	7		Positive	email	NPS
Tue Oct 17 2023 13:03:38 GMT+0000 (Coordinated Universal Time)	10 1. One stop shopping. Financial planning, Tax planning, Tax prep, Estate planning, Ease of communication.				
Sat Aug 26 2023 20:16:28 GMT+0000 (Coordinated Universal Time)	9 2. More aggressive investing Make the effort to learn EVERYTHING about your client's finances even if they are not under your coverage	FALSE	Positive	email	NPS
Mon May 15 2023 17:17:48 GMT+0000 (Coordinated Universal Time)	8 Individual customer service. More current and easily acceptable levels of return rates and comparisons.	FALSE	Neutral	email	NPS
Thu Jun 01 2023 15:41:07 GMT+0000 (Coordinated Universal Time)	10	FALSE	Positive	email	NPS
Wed Mar 15 2023 16:21:27 GMT+0000 (Coordinated Universal Time)	5 High fees - slow reaction.	FALSE	Negative	email	NPS
Thu Apr 27 2023 15:05:24 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Mon Nov 14 2022 17:21:46 GMT+0000 (Coordinated Universal Time)	10 Responsiveness. I value Chris Lott my adviser.I Love all the staff.There Always kind to me, Always work hard to make things right and answering any or all of my Questions. To improve things would be to make me more Money. But I believe Smith Anglin has protected my wealth through these difficult times in this volatile stock market .That is Hugh for me. Looking forward to future.	FALSE	Positive	email	NPS
Tue Apr 18 2023 17:51:09 GMT+0000 (Coordinated Universal Time)	10	FALSE	Positive	email	NPS
Thu Mar 30 2023 23:01:11 GMT+0000 (Coordinated Universal Time)	Better returns. ;)				
Tue May 09 2023 16:18:30 GMT+0000 (Coordinated Universal Time)	8 Explore more alternative investments that don't correlate with the stock market.	FALSE	Neutral	email	NPS
Tue Nov 01 2022 02:47:29 GMT+0000 (Coordinated Universal Time)	10 Expert financial advice	FALSE	Positive	email	NPS
Tue Jan 03 2023 18:28:26 GMT+0000 (Coordinated Universal Time)	8		Neutral	email	NPS
Wed Dec 07 2022 01:05:45 GMT+0000 (Coordinated Universal Time)	9	FALSE	Positive	email	NPS
Tue Apr 11 2023 03:24:19 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Thu Dec 15 2022 17:17:02 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS

Thu Feb 09 2023 22:51:00 GMT+0000 (Coordinated Universal Time)	10 I don't know what you can do to approve. For us, SmithAnglin has been wonderful. Best of all is our rapport with our advisor Dan Drummond. My wife and I feel comfortable bringing anything to his attention and though we've never met him face-to-face, we think of him as not only an advisor but a personal friend. Everyone else we've had contact with at SmithAnglin has also been wonderful. Submitting documents is fast and easy and we always get immediate attention to whatever we need. We are very thankful that SmithAnglin found us.	FALSE	Positive	email	NPS
Fri Dec 09 2022 18:23:12 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Wed Feb 22 2023 16:41:37 GMT+0000 (Coordinated Universal Time)	10 1.Expertise, helpfulness, communication		Positive	email	NPS
Thu Jan 19 2023 16:49:06 GMT+0000 (Coordinated Universal Time)	10 2. Nothing I can think of	FALSE	Positive	email	NPS
	I should have left for another firm years ago! but I liked the people there and I stayed.				
Fri Mar 10 2023 16:39:45 GMT+0000 (Coordinated Universal Time)	2 I would like to manage my assets without your assistance from here on out. I would like to the leave the money at fidelity and self direct. I have another advisor. Let me know ahead of time when deciding to change strategy based on what your research is telling you	FALSE	Negative	email	NPS
Fri Jan 06 2023 00:01:30 GMT+0000 (Coordinated Universal Time)	7 Hank Mulvihill.	FALSE	Neutral	email	NPS
Mon Feb 27 2023 19:41:31 GMT+0000 (Coordinated Universal Time)	10 My experience would like not getting candy for gifts of Christmas and birthday. I would like something like good olive oil. I value how kind and personable the staff is along with their expertise and professionalism. It is a first class company.	FALSE	Positive	email	NPS
Fri Apr 21 2023 20:43:29 GMT+0000 (Coordinated Universal Time)	10 To improve the experience I actually can not think of anything at this moment. I am very satisfied with Smith Anglin.	FALSE	Positive	email	NPS
Wed Nov 09 2022 17:26:33 GMT+0000 (Coordinated Universal Time)	9 1.Personal contact to inform & seek my input.	FALSE	Positive	email	NPS
Fri Jan 13 2023 19:55:11 GMT+0000 (Coordinated Universal Time)	10 2. Can't think of a thing.	FALSE	Positive	email	NPS
Thu Dec 01 2022 20:26:34 GMT+0000 (Coordinated Universal Time)	0		Negative	email	NPS
Wed Apr 12 2023 15:35:50 GMT+0000 (Coordinated Universal Time)	10 Can't think of a thing.	FALSE	Positive	email	NPS
Sun Jan 22 2023 22:48:53 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Tue Apr 04 2023 16:16:13 GMT+0000 (Coordinated Universal Time)	10 Chris is an amazing financial advisor and goes above and beyond for us! I am so appreciative of him and his hard work!	FALSE	Positive	email	NPS
Wed Jan 11 2023 20:57:47 GMT+0000 (Coordinated Universal Time)	4 1. Personalized Service		Negative	email	NPS
Wed Mar 15 2023 18:49:07 GMT+0000 (Coordinated Universal Time)	10 2.	FALSE	Positive	email	NPS
Mon Nov 28 2022 20:23:42 GMT+0000 (Coordinated Universal Time)	9		Positive	email	NPS
Fri May 12 2023 16:25:18 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Wed Mar 01 2023 18:20:58 GMT+0000 (Coordinated Universal Time)	10 Nothing.	FALSE	Positive	email	NPS
Wed Jan 04 2023 16:52:39 GMT+0000 (Coordinated Universal Time)	9		Positive	email	NPS
Tue Mar 07 2023 21:29:19 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Sun Jan 08 2023 22:57:10 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Fri Feb 03 2023 17:08:24 GMT+0000 (Coordinated Universal Time)	5 I haven't been contacted by my advisor.	FALSE	Negative	email	NPS
Tue Feb 07 2023 19:49:00 GMT+0000 (Coordinated Universal Time)	1. David Camarillo and his team				
Tue Aug 29 2023 23:22:17 GMT+0000 (Coordinated Universal Time)	10 2. Keep up the great support.	FALSE	Positive	email	NPS
Fri Feb 10 2023 20:16:45 GMT+0000 (Coordinated Universal Time)	8 Service is great. We are fairly new to Mith Anglin and very pleased.	FALSE	Neutral	email	NPS
	10		Positive	email	NPS
Mon Mar 06 2023 17:05:23 GMT+0000 (Coordinated Universal Time)	10 Nothing you communicate appropriately and manage my account to and exceeding my expectations	FALSE	Positive	email	NPS

	1. The hands on personal touch I feel Smith Anglin provides to me while at the same time performing as well as any wealth management firm multiple times their size.				
	2. I honestly can't think of anything that Smith Anglin doesn't already do, I like them that much because they are that good in my opinion.	FALSE	Positive	email	NPS
Thu Jun 08 2023 22:08:27 GMT+0000 (Coordinated Universal Time)	10				
Thu Nov 17 2022 18:07:43 GMT+0000 (Coordinated Universal Time)	10 Advice and updates from adviser	FALSE	Positive	email	NPS
Fri Feb 03 2023 17:10:30 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Mon Mar 27 2023 16:43:05 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
	Diligent customer service. But the most important thing is of course to 'grow our nest egg'!!!				
Tue Mar 14 2023 21:28:11 GMT+0000 (Coordinated Universal Time)	10	FALSE	Positive	email	NPS
	The quality, experience, character and integrity of the Smith Anglin team is outstanding. I have every confidence in their ability to manage my portfolio and anytime I have a question or concern I can always reach them in a moment's notice.				
	I really don't have anything to add regarding improving the experience. I've been pretty happy with everyone there for the last 4 years.				
Mon Feb 06 2023 16:31:16 GMT+0000 (Coordinated Universal Time)	10	FALSE	Positive	email	NPS
Tue Mar 07 2023 16:41:35 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Fri Apr 28 2023 17:41:43 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Mon Jun 19 2023 15:41:01 GMT+0000 (Coordinated Universal Time)	8 No precipitous drops, like in 2008	FALSE	Neutral	email	NPS
Thu Apr 06 2023 23:51:54 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Tue Dec 06 2022 16:15:12 GMT+0000 (Coordinated Universal Time)	9		Positive	email	NPS
Mon Feb 20 2023 17:57:52 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
	The successful investment strategy.				
Sat Sep 16 2023 03:28:40 GMT+0000 (Coordinated Universal Time)	10 Maybe a quicker response when the market recovers	FALSE	Positive	email	NPS
Thu Mar 30 2023 16:41:55 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
	Open communication with my advisor is important to me. Spenser has been great about communicating and answering my questions.				
Sat Oct 29 2022 11:06:36 GMT+0000 (Coordinated Universal Time)	10	FALSE	Positive	email	NPS
	Since the inception of my account with Smith Anglin, I have a negative rate of return. The biggest selling point that Weston made when he was soliciting my business was how good Smith Anglin was at wealth preservation. If I had invested in S&P 500 index over the same period, my return would have been 27.95%.				
	When the market crashed with COVID, Smith Anglin was slow to move to cash to preserve value and when tech stocks like AAPL and NFLX boomed, we stayed in cash.				
	I know that this is a challenging time, but it is for these challenging times that I am paying you as professionals to make strong financial decisions.				
	I am not ready to end my relationship with Smith Anglin, but would be hesitant to endorse the company to others.				
Mon Feb 20 2023 14:34:41 GMT+0000 (Coordinated Universal Time)	3	FALSE	Negative	email	NPS
Tue Apr 11 2023 16:02:03 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Thu Feb 02 2023 23:44:16 GMT+0000 (Coordinated Universal Time)	10 Immediate contact and answer to questions.	FALSE	Positive	email	NPS
Sat Apr 15 2023 13:30:51 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
	Nothing immediately comes to mind. I am satisfied, but before giving a really strong recommendation I need to see performance over a longer period (ie - how we come out the other end of the current inflationary period / possible recession)				
Fri Nov 18 2022 18:27:07 GMT+0000 (Coordinated Universal Time)	8	FALSE	Neutral	email	NPS
Thu Dec 15 2022 18:22:42 GMT+0000 (Coordinated Universal Time)	9 Knowledge of your personnel, commitment to customers.	FALSE	Positive	email	NPS
Fri Mar 24 2023 21:35:11 GMT+0000 (Coordinated Universal Time)	5 Account management and asset maintenance seems to have declined.	FALSE	Negative	email	NPS
Wed Feb 01 2023 21:59:07 GMT+0000 (Coordinated Universal Time)	8 Nothing comes to mind, Brian has been very helpful & informative.	FALSE	Neutral	email	NPS
Thu Dec 01 2022 13:55:22 GMT+0000 (Coordinated Universal Time)	1		Negative	email	NPS
Mon Nov 14 2022 18:07:36 GMT+0000 (Coordinated Universal Time)	10	FALSE	Positive	email	NPS
Fri Feb 10 2023 17:27:25 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Fri May 05 2023 16:43:55 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS

	1. One stop shopping. Ease of communication. Financial advice/planning. Estate planning. Tax planning/prep. The People are all very helpful, responsible, and responsive.				
	2. I have not had to do this yet so I am not sure if it is provided. But, legal services as far as setting up trusts as well as other legal documents. Do you or can you provide recommended agencies who can do this as well as projected costs				
Sat Sep 02 2023 02:37:33 GMT+0000 (Coordinated Universal Time)	9 associated.	FALSE	Positive	email	NPS
Fri Dec 09 2022 17:41:18 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Thu Jan 12 2023 18:57:02 GMT+0000 (Coordinated Universal Time)	10 I value the relationships, the honest interest in helping me manage my finances.	FALSE	Positive	email	NPS
Fri Oct 28 2022 16:11:43 GMT+0000 (Coordinated Universal Time)	10 Personal and accurate	FALSE	Positive	email	NPS
Sat Oct 29 2022 00:10:29 GMT+0000 (Coordinated Universal Time)	8	FALSE	Neutral	email	NPS
Thu Dec 01 2022 17:10:19 GMT+0000 (Coordinated Universal Time)	10	FALSE	Positive	email	NPS
Sat Dec 03 2022 20:21:27 GMT+0000 (Coordinated Universal Time)	10 Working with the staff.	FALSE	Positive	email	NPS
Fri Mar 03 2023 21:10:23 GMT+0000 (Coordinated Universal Time)	10 Nothing	FALSE	Positive	email	NPS
Fri Aug 25 2023 10:51:36 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Wed Mar 22 2023 01:04:58 GMT+0000 (Coordinated Universal Time)	10 The personalized client attention is phenomenal! Everyone is friendly and it's easy to speak with someone when we have a	FALSE	Positive	email	NPS
Tue Apr 04 2023 16:59:19 GMT+0000 (Coordinated Universal Time)	10 question.	FALSE	Positive	email	NPS
Mon Sep 04 2023 16:17:59 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Wed Apr 26 2023 11:20:09 GMT+0000 (Coordinated Universal Time)	10 Keep up the good investing decisions!	FALSE	Positive	email	NPS
Thu Jan 19 2023 17:41:53 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Fri Mar 31 2023 21:18:28 GMT+0000 (Coordinated Universal Time)	3		Negative	email	NPS
Wed May 03 2023 11:11:54 GMT+0000 (Coordinated Universal Time)	7		Neutral	email	NPS
Mon Feb 27 2023 17:10:08 GMT+0000 (Coordinated Universal Time)	9 Diligent monitoring of national financial trends	FALSE	Positive	email	NPS
Thu Feb 23 2023 00:39:06 GMT+0000 (Coordinated Universal Time)	10 CUSTOMER SERVICE	FALSE	Positive	email	NPS
Thu Apr 13 2023 14:23:31 GMT+0000 (Coordinated Universal Time)	6		Negative	email	NPS
Sat Jan 28 2023 05:34:34 GMT+0000 (Coordinated Universal Time)	7		Neutral	email	NPS
Tue Feb 21 2023 02:01:48 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Tue Jan 03 2023 16:37:29 GMT+0000 (Coordinated Universal Time)	10 Personal attention and service as well as appropriate current financial advise.	FALSE	Positive	email	NPS
Thu Apr 27 2023 19:31:50 GMT+0000 (Coordinated Universal Time)	10 Easy to start a conversation 1. The personal contact and relationship with have with Spencer Hamilton.	FALSE	Positive	email	NPS
Thu Feb 23 2023 17:35:21 GMT+0000 (Coordinated Universal Time)	9 2. Not sure.	FALSE	Positive	email	NPS
Mon Nov 28 2022 18:45:42 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Mon Jan 09 2023 16:52:56 GMT+0000 (Coordinated Universal Time)	7		Neutral	email	NPS
Thu Jun 01 2023 19:28:57 GMT+0000 (Coordinated Universal Time)	6 Still to determine if worth the cost.	FALSE	Negative	email	NPS
Fri Feb 24 2023 16:16:41 GMT+0000 (Coordinated Universal Time)	10 Simplicity-No improvements needed Love Hank as my advisor and there is nothing to improve your services that can be	FALSE	Positive	email	NPS
Fri Mar 10 2023 16:40:05 GMT+0000 (Coordinated Universal Time)	10 done from my stand point.	FALSE	Positive	email	NPS
Tue Mar 21 2023 20:44:24 GMT+0000 (Coordinated Universal Time)	10 David Camarillo You have many qualified people reading, discussing, agreeing/disagreeing on which ways to move. We need lots of voices, not one person who feels or acts as if he is the only knowledgeable person.	FALSE	Positive	email	NPS
Fri Jun 23 2023 17:12:41 GMT+0000 (Coordinated Universal Time)	10 Take a cruise!!	FALSE	Positive	email	NPS
Wed Mar 22 2023 01:02:36 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Tue Nov 29 2022 13:50:33 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Mon Nov 14 2022 03:23:00 GMT+0000 (Coordinated Universal Time)	7	FALSE	Neutral	email	NPS
Mon Dec 19 2022 19:22:18 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Sat Apr 08 2023 12:44:39 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Sun Feb 12 2023 01:09:23 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Thu Dec 08 2022 17:59:29 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Mon Apr 10 2023 15:21:48 GMT+0000 (Coordinated Universal Time)	10 Friendly folks. Always get my questions answered.	FALSE	Positive	email	NPS
Thu Dec 08 2022 19:57:29 GMT+0000 (Coordinated Universal Time)	10 Well researched investment advice.	FALSE	Positive	email	NPS
Fri Mar 10 2023 17:14:01 GMT+0000 (Coordinated Universal Time)	9		Positive	email	NPS
Sat Apr 22 2023 08:26:57 GMT+0000 (Coordinated Universal Time)	0 nothing	FALSE	Negative	email	NPS
Thu Jan 05 2023 16:58:55 GMT+0000 (Coordinated Universal Time)	9 trustworthy and followthru	FALSE	Positive	email	NPS

Fri Sep 01 2023 08:11:04 GMT+0000 (Coordinated Universal Time)	10 Trust.		Positive	email	NPS
Thu May 18 2023 01:28:38 GMT+0000 (Coordinated Universal Time)	10 Cannot think of anything I would change.	FALSE	Positive	email	NPS
Tue May 09 2023 15:59:55 GMT+0000 (Coordinated Universal Time)	10 1. Great customer service and honesty. You know your clients personally.	FALSE	Positive	email	NPS
Mon Jan 16 2023 23:44:55 GMT+0000 (Coordinated Universal Time)	10 2. Nothing. Keep on doing what you are.		Positive	email	NPS
Wed Apr 19 2023 17:51:26 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Mon Oct 23 2023 16:48:52 GMT+0000 (Coordinated Universal Time)	7		Neutral	email	NPS
Mon Dec 12 2022 19:05:39 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
	10		Positive	email	NPS
	Availability and response times are very important and you exceed our expectations.				
	I can not think of anything that I would like to see done differently.				
Sat Feb 11 2023 13:32:10 GMT+0000 (Coordinated Universal Time)	10 David has and continues to provide timely updates and itâ€™s a joy to catch up on the market and economy.	FALSE	Positive	email	NPS
Wed Nov 09 2022 20:26:42 GMT+0000 (Coordinated Universal Time)	9 Strategies related to the tax code	FALSE	Positive	email	NPS
Fri Feb 10 2023 19:19:15 GMT+0000 (Coordinated Universal Time)	10 I value the personal care of an expert watching my financial investments while I am overseas at work and unable to notice and react to market volatility.	FALSE	Positive	email	NPS
Fri Feb 24 2023 18:05:44 GMT+0000 (Coordinated Universal Time)	10		Positive	email	NPS
Mon Dec 12 2022 16:47:59 GMT+0000 (Coordinated Universal Time)	10 The customer service is fantastic with quick responses	FALSE	Positive	email	NPS