Status	Cash Comp?	Non-Cash Comp?	Month Year	Rating	Source	Review
Current Client	No	No	June-26	NA	Testimonial IQ	Jessica and Kent were extremely timely and helpful answering questions and providing guidance. Always appreciate their professionalism and patience
Current Client	No	No	June-26	NA	Testimonial IQ	Stacy and Chandler made us feel right at home and answered all of our questions and helped guide us thru some discussions on new financial situations. Chandler followed up with a phone call the next day to answer our questions regarding 529 accounts. We're very satisfied clients.
Current Client	No	No	June-26	NA	Testimonial IQ	Aaron was very helpful with some concerns that I had. He gave his advice and answered my question. He was very knowledgeable explaining my account. I would highly recommend Bush Financial Services.
Current Client	No	No	June-26	NA	Testimonial IQ	I can't say enough positive things about the Bush Wealth group! You have taken such good care of me and my finances . Every member of the group shows competency and professionalism in their dealings with clients. I am proud to be a client of the Bush Wealth team!
Current Client	No	No	June-26	Na	Testimonial IQ	I could not have dealt with the companies that we transferred money from had it not been for the help I received from Jessica Chick! Aaron has done a wonderful job keeping me informed about my investments and services you offer! I truly appreciate all of your help!!
Current Client	No	No	June-26	NA	Testimonial IQ	Always a pleasure to meet with Stacey and review current status of our investments. His advice has been spot on.
Current Client	No	No	June-26	NA	Testimonial IQ	Our visits are always GREAT from the front door to meeting and then leaving. Y'all always make people feel like family. You have personal conversations, go over everything, telling us where we stand and what we need to do for the next visit. We have never regretted going with Bush Wealth for our financial services. Keep up the great work. Thanks for all you do.
Current Client	No	No	May-26	NA	Testimonial IQ	Aaron as always is such a pleasure to work with. He is prepared and organized offering great feedback. He genuinely seems to care about my financial future and well being!
Current Client	No	No	May-26	NA	Testimonial IQ	I've been a client for 20 years now and have always found the staff at Bush Wealth to be the very best. Whoever is in charge of hiring and training, keep it up.
Current Client	No	No	May-26	NA	Testimonial IQ	Bush makes it easy. We've had more highs than lows and when the market "lost money" we just trusted the system and refused to second guess
Current Client	No	No	May-26	NA	Testimonial IQ	Great team , they always listen ,and help any way they can to make the most of your financial goals .
Non Client	No	No	May-26	NA	Testimonial IQ	On behalf of my dad, I want to express my appreciation for working with me as his daughter and POA to continue accomplishing his goals, and by providing a listening ear and sound advice. Bush Wealth is greatly appreciated for all the kindness and professionalism that is reflected by your team.
Current Client	No	No	April-26	NA	Testimonial IQ	Great meeting as usual. Last 9 years with Kent have been nothing but positive. We appreciate the personal touch, we talk business, but we also talk life. Happy with all the decisions he and Bush Wealth Management have made with our money.
Current Client	No	No	April-26	NA	Testimonial IQ	Great people to work with!
Current Client	No	No	March-26	NA	Testimonial IQ	Bush Wealth representatives are very personable, professional and genuinely interested in their clients! They take time to listen to what is happening in their clients lives and what big changes may be on the horizon. They have done well in developing strategies to maximize my financial wealth even during turbulent times!
Current Client	No	No	April-26	NA	Testimonial IQ	I greatly appreciated Carlee's help in the enrollment process yesterday. Her assistance helped me feel much better.
Current Client	No	No	March-26	NA	Testimonial IQ	Bush Wealth team, especially Kent know our needs, goals and are knowledgeable about our future plans. It's reassuring to know our financial future is in great hands!
Current Client	No	No	March-26	NA	Testimonial IQ	We appreciate the support and genuine interest in us. The discussion is focused on our interests and desires and how our investments align to them.
Current Client	No	No	March-26	NA	Testimonial IQ	Very informative meeting. Everyone was very nice and thorough about explanations of anything we had questions about.
Current Client	No	No	March-26	NA	Testimonial IQ	It was informative. Very professional . Advisor was knowledgeable and answered every question. You feel like your working with family
Current Client	No	No	March-26	NA	Testimonial IQ	Everyone involved at Bush Wealth Management was very friendly and helpful. We appreciate your patience and you were accommodating.
Current Client	No	No	March-26	NA	Testimonial IQ	Thank you for offering the service. We had an enjoyable and easy time making a will.
Current Client	No	No	February-26	NA	Testimonial IQ	Always a pleasure to meet with Bush wealth. It is a personal and informative experience and always helpful.
Current Client	No	No	March-26	NA	Testimonial IQ	We are so thank for everyone at Bush Wealth. I have to say Kent is second to none! He is always ready to take care of whatever we need. Carlee is also a great asset to always help when we call on her. I could go on and on on most individuals we deal with. You're all an amazing group. Erin too. I cannot leave her out. She is so pleasant on the phone or as we walk in the door. We met with Chance the other day. He was also very helpful with advice. Y'all are a 10 in our book. Thanks for
Current Client	No	No	February-26	NA	Testimonial IQ	The Team came prepared to talk about topics I wanted to speak to. It's impressive the team Bush Wealth has put together. Everything is always seamless. We've been working together for I believe almost 12yrs
Current Client	No	No	February-26	NA	Testimonial IQ	As always, everyone has been great to Debbie and I. We always look forward to meeting with the Bush Wealth team. God bless everyone. Go Vikings and Hunker down Dawgs.
Current Client	No	No	February-26	Na	Testimonial IQ	I had a very positive meeting with Aaron and Chandler then a good follow-up with Carlee. This team has been very attentive to my needs, particularly as I am planning to retire.
Current Client	No	No	February-26	NA	Testimonial IQ	Aaron knows ME. My challenges and my needs. I feel so confident having him as my advisor. PLUS, we share book recs!!
Current Client	No	No	February-26	NA	Testimonial IQ	It was good received the information I needed
Current Client	No	No	January-26	NA	Testimonial IQ	I am very pleased with Bush Wealth. They are super to work with and very knowledgeable. Hope to have many more years with this company.
Current Client	No	No	January-26	NA	Testimonial IQ	We have been with Bush Wealth for nine years, and they have never disappointed us. Their knowledge is top notch, and every one on their team goes above and beyond. is super nice.
Current Client	No	No	January-26	NA	Testimonial IQ	Kent us very knowledgeable and has helped grow the two accounts we have at Bush wealth. When I retire, I will move my 401 to Bush to manage for me.
Current Client	No	No	December-25	NA	Testimonial IQ	Friendly, competent, professional staff that is always readily available to handle any requests that we have or answer any questions.
Current Client	No	No	December-25	NA	Testimonial IQ	Bush Wealth makes it easy to trust. That line just keeps ticking up and up.
Current Client	No	No	November-25	NA	Testimonial IQ	It was a great meeting as we have come to expect in all our associations with Bush Wealth Management.
Current Client	No	No	November-25	NA	Testimonial IQ	We always have a great time reviewing our financial plans and future obligations with Bush Wealth. There are some things we forget but you remind us of things to assist in securing our financial future. Thanks.
Current Client	No	No	November-25	NA	Testimonial IQ	Everyone at Bush Wealth has over the last 20 years, always treated us in a professional and caring manner. Stacy should be proud of his staff.
Current Client	No	No	November-25	Na	Testimonial IQ	A very pleasant visit with All question, concerns discussed
Current Client	No	No	November-25	NA	Testimonial IQ	We always enjoy meeting and reviewing our portfolio. Staff seems highly competent and caring.
Current Client	No	No	November-25	NA	Testimonial IQ	The team is Always professional / friendly.Kent who is our advisor is always up beat and truly focused on our needs and accounts. He is always reachable and prepared. He has options for us to consider and if we have questions and he doesn't know answer he always follows up. Bush Wealth was the right place for us to place our investments for the future!
Current Client	No	No	November-25	Na	Testimonial IQ	Meeting was very informative, and enjoyed seeing staff. Thank you for taking care of our investment.
Current Client	No	No	October-25	NA	Testimonial IQ	We went for our annual review of our Portfolio. Aaron was professional detailed and always helpful . We are glad we made the decision nearly 20 years ago to have Bush Wealth help up with our portfolio. As we near retirement we are thankful we had the guidance an advice that they have provided.
Current Client	No	No	October-25	NA	Testimonial IQ	I had a very good meeting. Aaron was professional and informative. He explained my account and answered any questions I had. I am pleased with the way Bush is managing my account. Thank you.
Current Client	No	No	October-25	NA	Testimonial IQ	if the world was run more like Bush Wealth Management, it would be a better place." . that the high-quality service and the quick responses to our clients' needs and how we deeply care about our people is
Current Client	No	No	October-25	NA	Testimonial IQ	Everyone was very helpful, knowledgeable and professional. I have been looking forward to retirement for many years, Bush wealth were the right people to make that possible. Thanks To all.
Current Client	No	No	September-25	NA	Testimonial IQ	In approximately 10 years as a client I always have a good experience when dealing with Bush Wealth Management. My advisor, Stacy treats me like a friend and is very knowledgeable.
Current Client	No	No	September-25	NA	Testimonial IQ	Always very thorough discussions. Very helpful with ideas/options for future activities ie buying/ selling a home, traveling, major home projects, etc. Sincere interest in us. I feel so fortunate to have the Bush Wealth team supporting us.
Current Client	No	No	August-25	NA	Testimonial IQ	Aaron has always given me full attention and care with regards to my needs, the market situation, personal insights, and concerns that I might have with my finances. He is a super financial advisor and Stacy Bush is fortunate to have him on his team. I never have any hesitation in contacting Aaron. His professional skills in handling my accounts are matched by his caring personality, which is outstanding.
Current Client	No	No	August-25	NA	Email	We truly appreciate everything you do for us! It's a wonderful feeling knowing our financial future is in the hands of Bush Wealth!
Current Client	No	No	July-25	NA	Testimonial IQ	My wife and I have been with Bush Wealth for eight years. Stacy and his group are very knowledgeable in the investment market. We will continue to trust them to protect our financial needs.
Current Client	No	No	July-25	NA	Email	We are so blessed to have such amazing people at Bush Wealth Management protecting what we have worked so hard to build up. And to honor our granddaughter in such a wonderful way! Number one she loves Jesus and wants to work with children and adults who struggle to learn! Y'all are amazing!!
Current Client	No	No	July-25	NA	Email	The gift was just perfect for him and he really enjoyed it and they did too. It was a great day, but you have just made today so so special you just mean the world to us, you are not just our financial advisor. You're a very dear dear friend, and we appreciate you so much. God bless you and thank you again.
Current Client	No	No	July-25	NA	Testimonial IQ	Lisa and I really enjoy our visits with the Bush Wealth Team. You're always welcoming, informative and professional. Keep doing what you're doing, the way you're doing it!!!
Current Client	No	No	July-25	NA	Testimonial IQ	As always, everything was great and well organized. Stacy Bush and his business personnel have always been very courteous and efficient. Debbie and I have been well pleased with the Bush Wealth team.
Current Client	No	No	July-25	NA	Testimonial IQ	Great service as always.
Current Client	No	No	July-25	NA	Testimonial IQ	My experience was first class as always.
Current Client	No	No	March-25	NA	Email	Please extend my many thanks again, and appreciation, to Stacy and Brad for showing such kindness, patience, and respect to my daddy. There is special calmness and grace about this financial firm, and I recognize it as the Lord's blessing upon you all.
Current Client	No	No	January-25	NA	Suvey	I always appreciate that the staff is knowledgeable and so willing to help.
Current Client	No	No	January-25	NA	Survey	We totally trust him and know Kent has our best interest at heart!
Current Client	No	No	January-25	NA	Survey	We have a valued relationship with everyone on the Bush team. No matter what our question might be, someone is always readily available to professionally and cordially take care of us.
Current Client	No	No	January-25	NA	Survey	Stacy always follows through on what he says he will do. He also helps us make financial decisions that don't impact our portfolio. We trust his input!
Current Client	No	No	January-25	NA	Survey	My experience with Bush has been awesome. They are very responsive, super friendly, and I feel totally safe with my investment portfolio with them. They provide detailed information on the status of my portfolio and always answers any questions I have
Current Client	No	No	January-25	NA	Survey	Bush employees are always up to date, courteous and so helpful when I have questions or need help concerning my account. I appreciate them so much!
Current Client	No	No	January-25	NA	Survey	Questions answered promptly and fully. Relationships are usually good if the client is making money short term and long term- which we are. Staff knows your name and are very polite. Events are enjoyed by all, well planned, with great food. Well done in all aspects.
Current Client	No	No	January-25	NA	Survey	they seem to be monitoring the situation well
Current Client	No	No	January-25	NA	Survey	Advisor is attentive to client needs. Advisor shows concern for clients needs.
Current Client	No	No	January-25	NA	Survey	Very friendly and keeps me informed of any needed chamges.
Current Client	No	No	January-25	NA	Survey	Kent has been responsive and helpful every time I have needed him.
Current Client	No	No	January-25	NA	Survey	I'm very happy with the way Aaron and everyone else has handled my account.
Current Client	No	No	January-25	NA	Survey	I'm very pleased with everyone at bush wealth. They are professional in all aspects of everything they do.
Current Client	No	No	January-25	NA	Survey	Available when I have questions or concerns.
Current Client	No	No	January-25	NA	Survey	Always personable, accessible, and professional. You have done a great job choosing your staff. Always great to be around everyone. Thanks
Current Client	No	No	January-25	NA	Survey	Stacy has always taken the time to talk with us. We have had several other advisors so we can compare him as well as associates with other investment advisors.
Current Client	No	No	January-25	NA	Survey	I have been very satisfied with the level of service and attention to detail so far.
Current Client	No	No	January-25	NA	Survey	I just like the way business is handled
Current Client	No	No	January-25	NA	Survey	Any change in the distribution of my TOD is quickly made and any question I have about the investment is quickly answered. I have been graciously treated with all the contacts, whether I lived in the area or since I moved back to West Virginia.
Current Client	No	No	January-25	NA	Survey	Very knowledgeable and easily accessible. Seems to have my best interest at heart.
Current Client	No	No	January-25	NA	Survey	They communicate well and often.
Current Client	No	No	January-25	NA	Survey	The Bush group has always gone above and beyond to help with any situation. The entire staff is joyful to work with.
Current Client	No	No	January-25	NA	Survey	always available
Current Client	No	No	January-25	NA	Survey	You have provided excellent , professional and individualized services to me and now to my children as well.
Current Client	No	No	January-25	NA	Survey	Bush Wealth is a great company with a lot of great professional people.
Current Client	No	No	January-25	NA	Survey	Great professional personel
Current Client	No	No	January-25	NA	Survey	I always enjoy going to see everyone at Bush Wealth Management. Everyone is so cordial and friendly while keeping our best financial interests at heart.
Current Client	No	No	January-25	NA	Survey	The entire staff provide personal, professional attention. Questions are answered promptly and there is efficient follow up on requests
Current Client	No	No	January-25	NA	Survey	they are always ready to help me with any questions I might have. They provide immediate and friendly service They have done very well by me with my IRA and I trust them to continue to do so
Current Client	No	No	January-25	NA	Survey	My advisor is aware my current life status and my future plans. I trust him to help me make the best choices and decisions concerning my investments with the available resources in order to maintain my current lifestyle.
Current Client	No	No	January-25	NA	Survey	They are very helpful and listen to what my goal is
Current Client	No	No	January-25	NA	Survey	The Bush Wealth Team is always on the same page, you get consistent, complete and knowledgeable answers to all your financial questions
Current Client	No	No	January-25	NA	Survey	I'm very thankful for Bush Wealth Management. They value their clients and it shows.
Current Client	No	No	January-25	NA	Survey	You guys provide excellent customer service, timely communication and great advice!
Current Client	No	No	January-25	NA	Survey	They have been available anytime I had a question.
Current Client	No	No	January-25	NA	Survey	Every time I have a question, it is answered. We have our regular updates with your office. We never feel forgotten
Current Client	No	No	January-25	NA	Survey	The advisors are easily accessed and ready to assist.
Current Client	No	No	January-25	NA	Survey	I have trust they are working for me.
Current Client	No	No	January-25	NA	Survey	The Advisor provides adequate communication.
Current Client	No	No	January-25	NA	Survey	Very comfortable with Kent's logic behind his advice.
Current Client	No	No	January-25	NA	Survey	They are just all around great
Current Client	No	No	January-25	NA	Survey	Friendly, professional service. What you would expect for the fees charged. Investment results are very average and not deserving of glowing ratings
Current Client	No	No	January-25	NA	Survey	Very helpful and knowledgeable. Listens to your goals / objectives then gives recommendations or suggestions.
Current Client	No	No	January-25	NA	Survey	I am new to the firm, but I have found my financial advisor available and ready to answer questions and help research options.
Current Client	No	No	January-25	NA	Survey	You follow up with us. Phone review and materials have been sent to us. A few years ago, I was going to transfer some funds into Bush. They said to wait a year, so I wouldn't have an early withdrawal penalty. Cards on anniversaries and birthdays.
Current Client	No	No	January-25	NA	Survey	Professionalism and communication
Current Client	No	No	January-25	NA	Survey	I am not 100% sure my investments are treated the same as the investors treat their own
Current Client	No	No	January-25	NA	Survey	The interaction is simply an update of the standard bucket investment portfolios. The individual, unique strategic management of the account isn't very apparent.
Current Client	No	No	January-25	NA	Survey	Bush Wealth Management staff are all so professional, knowledgeable, with winsome personalities and a willingness to help. I deeply appreciate that I'm always able to talk to humans within a reasonable time frame.
Current Client	No	No	January-25	NA	Survey	My advisor helped me find my way out of a divorce and plan for my future. He is always there to answer my questions
Current Client	No	No	January-25	NA	Survey	I have no issues with the services. Being in a different tone zone makes it very difficult to schedule meetings.
Current Client	No	No	January-25	NA	Survey	Communications are good
Current Client	No	No	September-24	NA	Google	The staff at Bush Wealth Management is always pleasant, helpful and knowledgeable. If they don't have the answer for you, they will find one in a timely manner. I am newly retired and they have given me advise on all aspects of retired life. Big shout out to Carlee, who goes above and beyond (with a smile).
Current Client	No	No	February-24	NA	Survey	Discusses all areas of investments and answers any area of concerns in a manner easily understood. A warm, friendly environment.
Current Client	No	No	February-24	NA	Survey	I always appreciate that the staff is knowledgeable and so willing to help.
Current Client	No	No	February-24	NA	Survey	We totally trust him and know Kent has our best interest at heart!
Current Client	No	No	February-24	NA	Survey	We have a valued relationship with everyone on the Bush team. No matter what our question might be, someone is always readily available to professionally and cordially take care of us.
Current Client	No	No	February-24	NA	Survey	Stacy always follows through on what he says he will do. He also helps us make financial decisions that don't impact our portfolio. We trust his input!
Current Client	No	No	February-24	NA	Survey	My experience with Bush has been awesome. They are very responsive, super friendly, and I feel totally safe with my investment portfolio with them. They provide detailed information on the status of my portfolio and always answers any questions I have
Current Client	No	No	February-24	NA	Survey	Bush employees are always up to date, courteous and so helpful when I have questions or need help concerning my account. I appreciate them so much!
Current Client	No	No	February-24	NA	Survey	Questions answered promptly and fully. Relationships are usually good if the client is making money short term and long term- which we are. Staff knows your name and are very polite. Events are enjoyed by all, well planned, with great food. Well done in all aspects.
Current Client	No	No	February-24	NA	Survey	They seem to be monitoring the situation well.
Current Client	No	No	February-24	NA	Survey	Advisor is attentive to client needs. Advisor shows concern for clients needs.
Current Client	No	No	February-24	NA	Survey	Very friendly and keeps me informed of any needed changes.
Current Client	No	No	February-24	NA	Survey	Kent has been responsive and helpful every time I have needed him.
Current Client	No	No	February-24	NA	Survey	I'm very happy with the way Aaron and everyone else has handled my account.
Current Client	No	No	February-24	NA	Survey	I'm very pleased with everyone at bush wealth. They are professional in all aspects of everything they do.
Current Client	No	No	February-24	NA	Survey	Available when I have questions or concerns.
Current Client	No	No	February-24	NA	Survey	Always personable, accessible, and professional. You have done a great job choosing your staff. Always great to be around everyone. Thanks
Current Client	No	No	February-24	NA	Survey	Stacy has always taken the time to talk with us. We have had several other advisors so we can compare him as well as associates with other investment advisors.
Current Client	No	No	February-24	NA	Survey	I have been very satisfied with the level of service and attention to detail so far.
Current Client	No	No	February-24	NA	Survey	I just like the way business is handled.
Current Client	No	No	February-24	NA	Survey	Any change in the distribution of my TOD is quickly made and any question I have about the investment is quickly answered. I have been graciously treated with all the contacts, whether I lived in the area or since I moved back to West Virginia.
Current Client	No	No	February-24	NA	Survey	Very knowledgeable and easily accessible. Seems to have my best interest at heart.
Current Client	No	No	February-24	NA	Survey	They communicate well and often.
Current Client	No	No	February-24	NA	Survey	The Bush group has always gone above and beyond to help with any situation. The entire staff is joyful to work with.
Current Client	No	No	February-24	NA	Survey	Always available.
Current Client	No	No	February-24	NA	Survey	You have provided excellent , professional and individualized services to me and now to my children as well.
Current Client	No	No	February-24	NA	Survey	Bush Wealth is a great company with a lot of great professional people.
Current Client	No	No	February-24	NA	Survey	Great professional personel.
Current Client	No	No	February-24	NA	Survey	I always enjoy going to see everyone at Bush Wealth Management. Everyone is so cordial and friendly while keeping our best financial interests at heart.
Current Client	No	No	February-24	NA	Survey	The entire staff provide personal, professional attention. Questions are answered promptly and there is efficient follow up on requests
Current Client	No	No	February-24	NA	Survey	They are always ready to help me with any questions I might have. They provide immediate and friendly service They have done very well by me with my IRA and I trust them to continue to do so
Current Client	No	No	February-24	NA	Survey	My advisor is aware my current life status and my future plans. I trust him to help me make the best choices and decisions concerning my investments with the available resources in order to maintain my current lifestyle.
Current Client	No	No	February-24	NA	Survey	They are very helpful and listen to what my goal is
Current Client	No	No	February-24	NA	Survey	They are always available when we have questions!
Current Client	No	No	February-24	NA	Survey	The Bush Wealth Team is always on the same page, you get consistent, complete and knowledgeable answers to all your financial questions
Current Client	No	No	February-24	NA	Survey	I'm very thankful for Bush Wealth Management. They value their clients and it shows.
Current Client	No	No	February-24	NA	Survey	You guys provide excellent customer service, timely communication and great advice!
Current Client	No	No	February-24	NA	Survey	They have been available anytime I had a question.
Current Client	No	No	February-24	NA	Survey	Every time I have a question, it is answered. We have our regular updates with your office. We never feel forgotten
Current Client	No	No	February-24	NA	Survey	The advisors are easily accessed and ready to assist.
Current Client	No	No	February-24	NA	Survey	I have trust they are working for me.
Current Client	No	No	February-24	NA	Survey	The Advisor provides adequate communication.
Current Client	No	No	February-24	NA	Survey	Very comfortable with Kent's logic behind his advice.
Current Client	No	No	February-24	NA	Survey	They are just all around great.
Current Client	No	No	February-24	NA	Survey	Friendly, professional service. What you would expect for the fees charged. Investment results are very average and not deserving of glowing ratings.
Current Client	No	No	February-24	NA	Survey	Very helpful and knowledgeable. Listens to your goals / objectives then gives recommendations or suggestions.
Current Client	No	No	February-24	NA	Survey	I am new to the firm, but I have found my financial advisor available and ready to answer questions and help research options.
Current Client	No	No	February-24	NA	Survey	You follow up with us. Phone review and materials have been sent to us. A few years ago, I was going to transfer some funds into Bush. They said to wait a year, so I wouldn't have an early withdrawal penalty. Cards on anniversaries and birthdays.
Current Client	No	No	February-24	NA	Survey	I am not 100% sure my investments are treated the same as the investors treat their own
Current Client	No	No	February-24	NA	Survey	The interaction is simply an update of the standard bucket investment portfolios. The individual, unique strategic management of the account isn't very apparent.
Current Client	No	No	February-24	NA	Survey	Bush Wealth Management staff are all so professional, knowledgeable, with winsome personalities and a willingness to help. I deeply appreciate that I'm always able to talk to humans within a reasonable time frame.
Current Client	No	No	February-24	NA	Survey	My advisor helped me find my way out of a divorce and plan for my future. He is always there to answer my questions
Current Client	No	No	February-24	NA	Survey	I have no issues with the services. Being in a different tone zone makes it very difficult to schedule meetings.
Current Client	No	No	February-24	NA	Survey	Communications are good.
Current Client	No	No	February-24	NA	Survey	Kent's the best. We are so thankful for all he does l. He goes above and beyond our finances.
Current Client	No	No	February-24	NA	Survey	He has been a great support for us since 2007. He must be doing something right!
Current Client	No	No	February-24	NA	Survey	We are confident in the path Bush Wealth has for our financial future.
Current Client	No	No	February-24	NA	Survey	Aaron and Patrick have both been very responsive and helpful.
Current Client	No	No	February-24	NA	Survey	Have received outstanding service from everyone with whom I have dealt.
Current Client	No	No	February-24	NA	Survey	I would have a hard time singling out any team member as all of them are so ready to help!
Current Client	No	No	February-24	NA	Survey	Kent's the best! He remembers and calls for birthdays, anniversaries, the death of my mom. â□¤ï¸□ He is just amazing. We are thankful for him and the rest of the team!!!
Current Client	No	No	February-24	NA	Survey	Every team member should be recognized for outstanding service.
Current Client	No	No	February-24	NA	Survey	Both Kent and Aaron have been excellent. They are friendly and professional. They take the time to answer any questions we have and are very detailed.
Current Client	No	No	February-24	NA	Survey	Heather is always awesome!
Current Client	No	No	February-24	NA	Survey	Kent has been very helpful throughout the years and I appreciate all he has done and continues to do. Retirement and selling property ahead and I am confident that he will guide us through these difficult transitions.
Current Client	No	No	February-24	NA	Survey	Everyone does a great job and the recently added staff members seem to be excellent choices. However, I would like to call attention to the job that Heather Van Horn does coordinating events that keep staff and clients connected. I think it is very important to be able to share time with each other outside of the office. It enhances the work relationship.
Current Client	No	No	February-24	NA	Survey	The entire team was extremely helpful during the time when both of my parents had passed away. The staff helped me tremendously with the transfer process of the estate. I will always be grateful for their help during a tough time.
Current Client	No	No	February-24	NA	Survey	Rob, Chandler, Aaron, Courtney and Stacy are all top notch and are incredibly personable while maintaining a professional relationship eager to do what is financially best for our future.
Current Client	No	No	February-24	NA	Survey	Jessica Chick was very helpful with follow up on my annuity this year. I appreciated help.
Current Client	No	No	February-24	NA	Survey	I love the fact way Bush Wealth works as a team! The fact that they promote from within demonstrates the fact that they chose well from candidates for employment!
Current Client	No	No	February-24	NA	Survey	Kent and Rob are amazing! But they are all top notch!
Current Client	No	No	November-23	NA	In-Person	https://www.dropbox.com/scl/fi/ujf3rcv9ncwld3dcqn75x/Bush-Wealth-20th-Anniversary-revised-2.mp4?rlkey=85gvnspolly6wglf65syqgzp4&dl=0
Current Client	No	No	November-23	NA	In-Person	https://www.dropbox.com/scl/fi/ujf3rcv9ncwld3dcqn75x/Bush-Wealth-20th-Anniversary-revised-2.mp4?rlkey=85gvnspolly6wglf65syqgzp4&dl=0
Current Client	No	No	November-23	NA	In-Person	https://www.dropbox.com/scl/fi/ujf3rcv9ncwld3dcqn75x/Bush-Wealth-20th-Anniversary-revised-2.mp4?rlkey=85gvnspolly6wglf65syqgzp4&dl=0
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Current Client	No	No	November-23	NA	In-Person	https://www.dropbox.com/scl/fi/ujf3rcv9ncwld3dcqn75x/Bush-Wealth-20th-Anniversary-revised-2.mp4?rlkey=85gvnspolly6wglf65syqgzp4&dl=0
Current Client	No	No	January-23	N/A	Client Survey	Professional group; communicated well, always available, but accounts do not out perform the indexes
Current Client	No	No	January-23	N/A	Client Survey	Great guidance and service provided.
Current Client (as of Jan '23)	No	No	January-23	N/A	Client Survey	Because I refer others to you all the time. Plus I am extremely please with prompt services I receive as well as historical financial information.
Current Client	No	No	January-23	N/A	Client Survey	I'm very satisfied with my advisor.
Current Client	No	No	January-23	N/A	Client Survey	Overall very satisfied.
Current Client	No	No	January-23	N/A	Client Survey	I am satisfied with the services I get at Bush.
Current Client	No	No	January-23	N/A	Client Survey	Very satisfied!
Current Client	No	No	January-23	N/A	Client Survey	I am well pleased.
Current Client	No	No	January-23	N/A	Client Survey	could keep me a bit better informed about what the market is doing. The money I have in the bank doesn't gain, but at least it doesn't lose 20% either. Why am I sitting on losing investments?
Current Client	No	No	January-23	N/A	Client Survey	They are all eager to know their clients personally to the extent that their schedule allows. It is easier to trust someone with your assets if they have a sincere interest in my life.
Current Client	No	No	January-23	N/A	Client Survey	Bush Wealth Management Team provides an OUTSTANDING SERVICE.
Current Client	No	No	January-23	N/A	Client Survey	We are new to Bush Wealth, so we are still learning and getting a feel for this new relationship.
Current Client	No	No	January-23	N/A	Client Survey	My advisor does a great job helping me navigate this challenging time and that is much appreciated!
Current Client	No	No	January-23	N/A	Client Survey	Find a way to increase my annual dividends without greater risk! An impossibility, I'm sure! LOL!
Current Client	No	No	January-23	N/A	Client Survey	Try not to change two appointments in a row.
Current Client (as of Jan '23)	No	No	January-23	N/A	Client Survey	doing great!
Current Client	No	No	January-23	N/A	Client Survey	My advisor is knowledgeable and professional and cares about clients.
Former Client	No	No	January-23	N/A	Client Survey	Both Stacy and Kent have always responded to my questions/needs in a timely manner and I feel have my best interest at heart with regard to my meager account!
Current Client (as of Jan '23)	No	No	January-23	N/A	Client Survey	They have my interest in investing.
Current Client	No	No	January-23	N/A	Client Survey	Support is adequate.
Current Client	No	No	January-23	N/A	Client Survey	Excellent customer service. I appreciate them taking the time to explain the markets and why my money is where it is and answering all of my questions no matter how trivial they may seem.
Current Client	No	No	January-23	N/A	Client Survey	They are a blessing to work with.
Current Client (as of Jan '23)	No	No	January-23	N/A	Client Survey	I am getting better returns from another firm with far lower fees.
Current Client	No	No	January-23	N/A	Client Survey	He is doing a wonderful job for us.
Current Client	No	No	January-23	N/A	Client Survey	Our financial advisor has demonstrated integrity by maintaining our accounts with due diligence and advising us on issues that need our attention and is in compliance with our expressed interests.
Current Client	No	No	January-23	N/A	Client Survey	They are always very responsive when I call and do a great job of managing my assets and keeping me informed on changes that may affect my portfolio performance.
Current Client (as of Jan '23)	No	No	January-23	N/A	Client Survey	Because how you check in on us and have the phone meetings. Prompt to return calls, and have been with y'all almost 20 years. Several years ago, we were going to move one of our accounts from another group and we were told to wait a year, so we wouldn't have a penalty for early withdrawal.
Current Client (as of Jan '23)	No	No	January-23	N/A	Client Survey	The firm and advisors are very personable, but more important, the advisors are knowledgeable.
Current Client	No	No	January-23	N/A	Client Survey	Mt financial team has answered every question and made me feel comfortable with the direction we are going. In this very volatile time I am at peace.
Current Client	No	No	January-23	N/A	Client Survey	My Bush advisor is doing an excellent job despite such a challenging time. I have been very happy with their service.
Current Client (as of Jan '23)	No	No	January-23	N/A	Client Survey	communication is very important. also, always take time for any questions that we may have. Always have answer with explanting to us. Thank you,
Current Client (as of Jan '23)	No	No	January-23	N/A	Client Survey	Great company to work with.
Current Client	No	No	January-23	N/A	Client Survey	Excellent Service
Current Client	No	No	January-23	N/A	Client Survey	Personal touch like celebrating birthdays and anniversaries. I also like that I can get in touch with them whenever I like.
Current Client (as of Jan '23)	No	No	January-23	N/A	Client Survey	Attention to detail. Strong focus on my comfort level with risk and investment options. Sincere interest in myself and my spouse. Competent and very knowledgeable staff. Strong and proactive communication.
Current Client (as of Jan '23)	No	No	January-23	N/A	Client Survey	They are always available and responsive to our requests.
Current Client	No	No	January-23	N/A	Client Survey	I have never worked with an organization that is so personable. The measure your company takes to make us feel like we matter, goes beyond our expectation, Thank you so much.
Current Client	No	No	January-23	N/A	Client Survey	Co led through bad market with what i consider minimal losses
Current Client	No	No	January-23	N/A	Client Survey	Larry and I have been clients almost 20 years. We both have served on the Advisory Board but not simultaneously. Stacy has ALWAYS listened as well as advised. Both qualities are rare in a "financial advisor" as we have previously experienced. We have recommended Stacy to numerous people. He is an outstanding member of the Valdosta community, a devoted husband and father, and a trusted person. While the staff may come and go, Stacy is firm, solid and trustworthy. HE is the reas

Status	Cash Comp?	Non-Cash Comp?	Month Year	Rating	Source	Review
Current Client (as of Jan '23)	No	No	January-23	N/A	Client Survey	As long time investors with Bush Wealth, we have always been pleased with the way they handle our portfolio. We know that the professionals at Bush Wealth are taking care of our finances, especially during these troublesome economic times.
Current Client	No	No	January-23	N/A	Client Survey	We have been with Stacy Bush for 16 years and have full confidence that he has our back and is managing our portfolio with excellence. We have recommended him to many of our friends and family and they are pleased as well. Stacy truly cares about his clients and we are so grateful to be on his team. It has been a win-win from the beginning.
Current Client	No	No	January-23	N/A	Client Survey	They have been very helpful and listened to our concerns
Current Client	No	No	January-23	N/A	Client Survey	Professional,very knowledgeable, makes it easy to understand and always friendly.
Current Client (as of Jan '23)	No	No	January-23	N/A	Client Survey	I feel as if he has my back and is caring for my future.
Current Client	No	No	January-23	N/A	Client Survey	always very friendly , professional service+ thorough explanation what is going on
Current Client	No	No	January-23	N/A	Client Survey	They have improved their customer service! We hate that they are so far away!
Current Client	No	No	January-23	N/A	Client Survey	Realistic
Current Client (as of Jan '23)	No	No	January-23	N/A	Client Survey	Kent is always professional, personable and follows up timely when I have questions.
Current Client	No	No	January-23	N/A	Client Survey	Very Honest and easy to talk with about all issues and you can tell him your true feelings and thoughts and know he will not take it personal
Current Client	No	No	January-23	N/A	Client Survey	Stacy Bush is a highly knowledgable professional in his field that gives personal attention to each of his clients. He responds quickly and effectively to every concern his client has.
Current Client	No	No	January-23	N/A	Client Survey	Only one reason: Outstanding service!
Current Client	No	No	January-23	N/A	Client Survey	They made it easy to understand, down to earth. Answered all our questions. Feel comfortable to call with any questions etc.
Current Client	No	No	January-23	N/A	Client Survey	They keep me informed and are always eager to help.
Current Client	No	No	January-23	N/A	Client Survey	Good interaction
Current Client	No	No	January-23	N/A	Client Survey	We enjoy the in person annual/semi-annual dinners, and the individual annual meeting. Also, anytime We have needed to access money, it has been handled immediately. We trust this firm.
Current Client	No	No	January-23	N/A	Client Survey	1) Prompt response to questions we sent. 2) Very organized and customer service oriented. 3) Performs timely Bi-annual reviews with client following a special agenda that covers client needs and concerns. 4) Maintains Excellent Communications. 5) Agile organization. 6) My wife & I have a lot of confidence / trust in this firm.
Current Client	No	No	January-23	N/A	Client Survey	You had seen to it that my investment had increased from somewhere in the 540 thousand range to almost 700 thousand. Your decision investing my money had dropped to the 570 thousand range. I instructed you to just invest in a three month cd, which you have done twice (total of 6 months). Thank goodness we didn't continue investing in the stock market.
Current Client	No	No	January-23	N/A	Client Survey	These are great people that work so hard
Current Client	No	No	January-23	N/A	Client Survey	Kent is always honest with us and what he thinks the outcome will be. He makes us feel comfotable with him handling our account as if it were his.
Current Client	No	No	January-23	N/A	Client Survey	Bush Wealth Management is ready to assist me in any way they can.
Current Client	No	No	January-23	N/A	Client Survey	Very responsive and knowledgable.
Current Client	No	No	January-23	N/A	Client Survey	Stacy and staff are good folks and try there best to serve
Current Client	No	No	January-23	N/A	Client Survey	They do what they say and have done a good job of managing my assets. They are more like family than business associates.
Current Client	No	No	January-23	N/A	Client Survey	They do a good job and are very responsive to my needs
Current Client	No	No	January-23	N/A	Client Survey	Available when I have a question or concern. Thoughtful with gifts around holidays
Current Client	No	No	January-23	N/A	Client Survey	I'm very happy with Bush Wealth. You support us with every decision we make.
Current Client	No	No	January-23	N/A	Client Survey	Because I am pleased with the services and care I get from my advisers. I appreciate the history they provide regarding my accounts.
Current Client	No	No	January-23	N/A	Client Survey	They understand my goals and advise when necessary. They are friendly and professional! Love them all!
Current Client	No	No	January-23	N/A	Client Survey	Kent has been very easy to work with and does his best to explain what we don't understand and keep us informed.
Current Client	No	No	January-23	N/A	Client Survey	I mainly deal with Kent. He is always helpful and does not make me feel inadequate. The other staff members are very nice and helpful.
Employee	No	No	August-22	5	Google	
Former Client (Deceased)	No	No	January-22	N/A	Client Survey	Needs to take more time explaining things
Current Client	No	No	January-22	N/A	Client Survey	I'm happy.
Former Client (moved)	No	No	January-22	N/A	Client Survey	Stacy and his team are excellent in all areas.
Current Client	No	No	January-22	N/A	Client Survey	They do a great job!
Current Client	No	No	January-22	N/A	Client Survey	More events in person.
Current Client	No	No	January-22	N/A	Client Survey	The service is awesome.
Current Client	No	No	January-22	N/A	Client Survey	Provide a more simple, emailed monthly quick-chart of investment performance overall, overlaying individual investment performances, and showing what other investment options have done over the same period. Even something like the chart done in the newsletter every week would be good for my specific investments and investment options.
Current Client	No	No	January-22	N/A	Client Survey	They do a great job of keeping us up to date with the changing economy
Current Client	No	No	January-22	N/A	Client Survey	Love every one in the office.
Former Client (Deceased)	No	No	January-22	N/A	Client Survey	To check up on me /my financial situation more often. Spend time explaining things.
Current Client	No	No	January-22	N/A	Client Survey	Totally satisfied with current services
Current Client	No	No	January-22	N/A	Client Survey	We are so pleased with Bush management that we can't think of any thing that needs to be done differently! They are doing a great job!
Current Client	No	No	January-22	N/A	Client Survey	He has done a great job and hope it can continue that way.
Current Client (as of Jan '22)	No	No	January-22	N/A	Client Survey	Doing an outstanding job for us
Current Client (as of Jan '22)	No	No	January-22	N/A	Client Survey	Provide option to have statements available in printed copy vs. online/website.
Current Client (as of Jan '22)	No	No	January-22	N/A	Client Survey	More rooftop socials - text if my total investments go above or below a certain threshold (20%?).
Current Client (as of Jan '22)	No	No	January-22	N/A	Client Survey	Service is good. Can't think of an obvious need for improvement. Just not sure that once a program is set up, the service provided justifies the cost.
Current Client (as of Jan '22)	No	No	January-22	N/A	Client Survey	He is doing a great job.
Current Client	No	No	July-21	N/A	In-Person	https://www.dropbox.com/scl/fo/amlnzgh2f1kbrohry81ng/h?dl=0&rlkey=alqn2ln1grr7wvd9wxhydpuxm
Current Client	No	No	July-21	N/A	In-Person	https://www.dropbox.com/scl/fo/amlnzgh2f1kbrohry81ng/h?dl=0&rlkey=alqn2ln1grr7wvd9wxhydpuxm
Current Client	No	No	July-21	N/A	In-Person	https://www.dropbox.com/scl/fo/amlnzgh2f1kbrohry81ng/h?dl=0&rlkey=alqn2ln1grr7wvd9wxhydpuxm
Former Client (moved)	No	No	July-21	N/A	In-Person	https://www.dropbox.com/scl/fo/amlnzgh2f1kbrohry81ng/h?dl=0&rlkey=alqn2ln1grr7wvd9wxhydpuxm
Current Client	No	No	July-21	N/A	In-Person	https://www.dropbox.com/scl/fo/amlnzgh2f1kbrohry81ng/h?dl=0&rlkey=alqn2ln1grr7wvd9wxhydpuxm
Current Client	No	No	July-21	N/A	In-Person	https://www.dropbox.com/scl/fo/amlnzgh2f1kbrohry81ng/h?dl=0&rlkey=alqn2ln1grr7wvd9wxhydpuxm
Former Client	No	No	June-18	5	Google	Excellent service and very professional. They provide a solid "family like" atmosphere that makes you feel secure and comfortable with managing your finances. The entire organization is easily accessible, pleasant, and always eager to help. A+ rating, and I always recommend them to everyone!
Current Client	No	No	June-18	5	Google	We have been with Stacy Bush and his team since 2011 and have been very pleased with the personal service and attention to detail. We have had very good returns on our investments and when trouble comes up on the economic front they always contact us to explain or change our positions.We feel we are a part of a family instead of a client. Thanks to Stacey and Team.
Unknown	No	No	June-18	4	Google	Have been with Busk Wealth almost from the beginning and they have never put me into a product that has lost me money. May not have made a "killing" but never had to break out the crying towel either. Their fees may be a bit high but hey, you get what you pay for. Always there when I have a question. Last but not least, there is a great bowl of candy on the front desk. Drop in, say hi and snitch a piece.
Current Client	No	No	June-18	5	Google	
Current Client	No	No	June-18	5	Google	
Current Client	No	No	June-18	5	Google	I just opened an TOD account with Bush Wealth Management and was very impressed with the service they provided me. The staff was and has been very courteous and helpful in helping me.
Current Client	No	No	June-18	5	Google	I've been with Bush Wealth Management for a little over 10 years and this is the most professional group of people I've ever dealt with. Their advice is always easily understood even for a novice investor, as I was 10 years ago. Stacy is honest and direct and I'm really glad I was introduced to him. I have recommeded a number of people to visit Bush Wealth and will continue to do so.
Current Client	No	No	June-18	5	Google	Stacy and his team are the best !!!!
Current Client	No	No	June-18	5	Google	
Current Client	No	No	June-18	5	Google	
Current Client	No	No	June-18	3	Google	
Unknown	No	No	June-18	5	Google	Caring, interested, and involved - a top notch group to place your trust in.
Current Client	No	No	June-18	5	Google	
Unknown	No	No	June-18	5	Google	
Current Client	No	No	May-18	5	Google	Bush Wealth Management provides a high level of professional service and consulting services for short and long term financial planning and I have been very satisfied with the level of service given
Former Client (Deceased)	No	No	May-18	5	Google	
Current Client	No	No	May-18	5	Google	Working with Bush Wealth Management is like having an extended family that always has your back. Thankful that I chose Bush Wealth Management to handle my investments.
Current Client	No	No	May-18	5	Google	Excellent Client Service!
Current Client	No	No	May-18	5	Google	This group has been great to work with!
Employee	No	No	May-18	5	Google	
Current Client	No	No	May-18	5	Google	Bush manages our account in a conservative manner as we requested
Current Client	No	No	May-18	5	Google	Stacy Bush and the staff at Bush Wealth Management set the bar for excellent service, integrity, and financial management!
Employee	No	No	May-18	5	Google	
Unknown	No	No	March-18	1	Google	If you do not invest more than $100,00, you will pay up to $500 a month in administrative fees. We lost more than $7,000 in just over a year, and it was not all because of market fluctuation. It was a horrible experience where only the wealthy are looked after and their money and time valued. If you have only a small nest egg and want it to grow, do not seek Bush Wealth Mgmt. We went elsewhere and found a true Christian in Cairo who really cares about us and our future and helps

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