

PROPOSAL DATA

Company & AdvisorName

TypeTitle

Status

TemplateCategory

TemplateSelection

Date Range

All

All

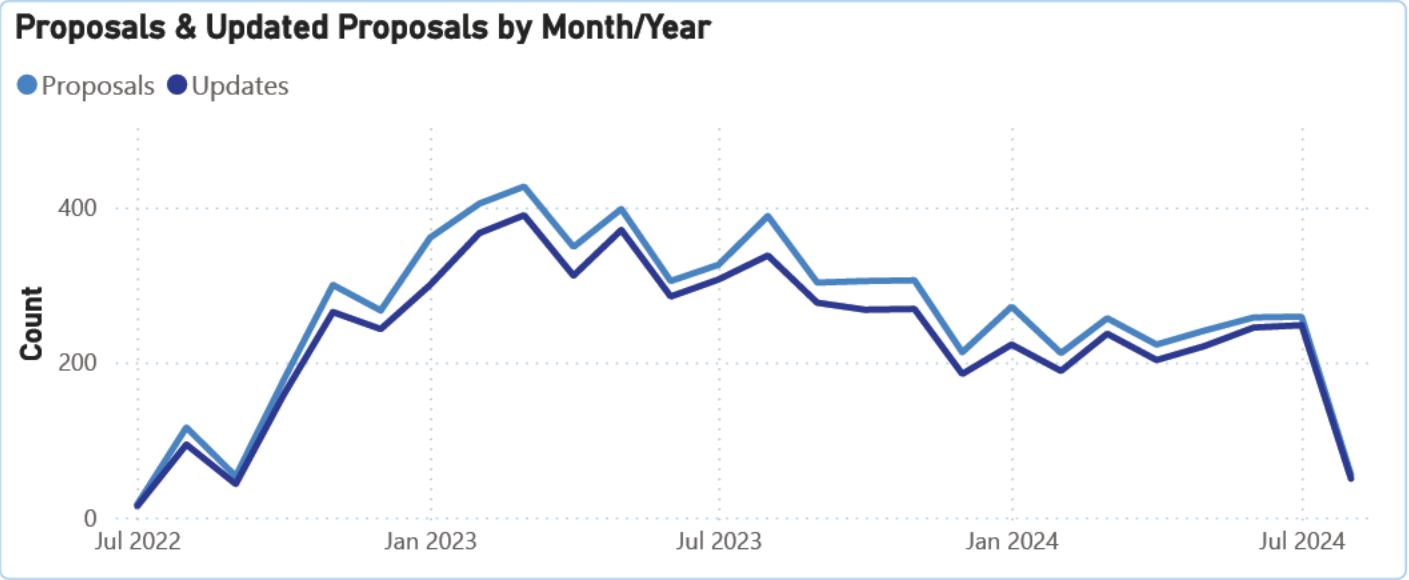
All

All

All

7/29/2022

Proposal Counts by Quarter			
N	Updates	Year	Quarter
185	151	2022	Qtr 3
744	666	2022	Qtr 4
1193	1057	2023	Qtr 1
1052	968	2023	Qtr 2
1018	922	2023	Qtr 3
824	722	2023	Qtr 4
741	649	2024	Qtr 1
722	669	2024	Qtr 2
314	298	2024	Qtr 3
6793	6102		



Total Proposals by Company	
N	Company Name
659	
200	
174	
128	
126	
122	
120	
112	
105	
103	
101	Little B. Associates
6793	

Proposal Categories	
N	Proposed Category
2087	Other
850	IRA
566	Test Category
362	Proposal
219	Roth IRA
161	IRA, Proposal
122	Allocation
99	Account, Review
99	Retirement
96	Trust
80	Investment
73	401(k)
71	Portfolio
6793	

Actual Proposal Name	
N	Proposal Name
437	test
63	account review
53	ira proposal
41	proposal
38	ira
32	proposal 1
28	retirement
27	sample
25	joint account
21	investment proposal
21	t
18	test proposal
17	reallocation
6793	

Total Proposals by Company/Advisor/Role			
N	Company Name	Full Name	Role
635			
180			Advisor
168			Advisor
122			Advisor
103			Advisor
94			Bos Contact
85			Advisor
85			Advisor
84			Advisor
76			Advisor
70			Advisor
55			Advisor
49			Advisor
6793			