[Demo] NLP Dataset for Customer Service Automation

| Company Type | Investment Firms |
|-----------------------------|---|
| Inquiry Category | Transfer and rollover inquiries |
| Inquiry Sub- Category | Account consolidation |
| Description | Customers inquire about consolidating multiple investment accounts into a single account to simplify their investment management and potentially reduce expenses. |
| Data Size | 5,008 paraphrases |
| Want to buy data? | Please contact nlp-data@qross.me via your business email address. |

Masked sample paraphrases of one "Investment Firm" customer inquiry. (Purchased data will not be masked.)

| Can adv | rise fund | s | to a new | | with your firm | ? |
|---------------|--------------------|-------------------|-------------------|---------------|------------------|------------|
| You can | of | from multi | ple brokers to _ | po | ortfolio. | |
| | give | | | | | |
| | to advise | | | | | solidated? |
| Looking for _ | help pooling m | oney | into _ | h | ıub. | |
| I'd to | in m | ultiple | _ into a single a | count | compan | y. |
| you tell | co | nsolidate funds f | rom multiple ac | counts | new | ? |
| We want | _ investments | become part | a | the | your o | company. |
| Money from _ | be | transferred | company' | s portfolio. | | |
| can I | information on | from r | nultiple brokera | .ges | accou | ınt? |
| How can | our | brokera | ges a singl | e account? | | |
| How | assist with comb | ining the saving | s numerou | s | _a? | • |
| you | transfer mo | ney multipl | e accounts | s my fi | rm? | |
| need as | sistance my _ | from several | into | · | | |
| How do | transfer money fro | m | to a | | _ firm? | |
| There g | uidance in me | rging | across br | okerages. | | |
| Transfer | multiple acc | ounts | consolidated | yo | ur firm? | |
| | mone | ey from all | brokerages | _ a por | rtfolio with you | ι? |
| trying _ | several b | rokerage in | to po | ortfolio | _your compan | y. |
| How can | combine the | mult | iple | consoli | idated portfolio | ο? |
| assets _ | | _ to consolidate | your firm's | s umbrella _ | needed. | |
| want to | information a | bout merging | from | | central | _ account. |
| | several brokera | ges co | ompany's portfo | lio is someth | ning that | • |
| How can | _ transfer | _ brokerages to | a? | | | |
| | transfer money | from accou | nts make _ | consoli | idated portfolio | o with? |
| you | _ us with prod | cess of | from multiple | c | create | portfolio? |
| | your servi | ces to unify my _ | brokerage _ | ? | | |
| You adv | ice transferri | ng from bro | kerages | compan | ıy's | |
| I approx | riata it vou | mo | | brokere ir | ato ono accoun | + |

| How | funds from | _ brokerages | poi | rtfolio under your | ? | |
|-----------------|------------------|-------------------------------|----------------|---------------------|-----------------|----------------|
| I am curious | moving my _ | multiple | a si | ngle | · | |
| | | _ from multiple bro | okers to a new | portfolio | firm. | |
| How can c | ombine my | | portfolio | your services | s? | |
| How I cons | solidate | firm | 1? | | | |
| | | can help | | to c | onsolidated | ? |
| | | me | | | | |
| | | portfolio, you | | | | le brokerages. |
| | | all o | | | | |
| | | to consolidate our i | | | | |
| | | moving my | | | · | |
| | | moving my my | | | | |
| | | | | | ount with wour | company? |
| | | assets fro across multiple | | | | |
| | | | | | | · |
| | | olidate investment | | | | |
| | | investments | | | ? | |
| | | ne funds | | | | |
| | | into a | | | | |
| | | from | | | | |
| | | | | | | |
| Would be | to give ad | vice on merging | | | consolidate | d account? |
| | | ice about merging | | | | |
| possi | ble you to | on | noving funds _ | multiple broke | erages to | consolidated? |
| I need tran | nsfer from | to your | ·• | | | |
| There should be | for | held | brokerages | central | ized portfolio. | |
| should be | mer | ging funds | several | _ into a centralize | d | |
| do | from _ | accounts to _ | consolidate | ed for your fi | rm? | |
| | able to w | ith the transfer of f | funds | to a o | combined | ? |
| advice | _ transferring t | funds | to your | _ portfolio | | |
| Do have in | sights on | funds b: | rokerages | a consolida | ted? | |
| | | the distribut | | | | io? |
| | | ing sources _ | | | | |
| | | transfer funds | | | portfolio | my firm? |
| | | — — multiple brokerage | | | | • |
| | | ging fro | | | | |
| | | me n | | | a new por | tfolio? |
| | | from acc | | | | |
| | | oving funds from _ | | | With your | ' |
| | | to into | | | | |
| | | | | | 20001111 | ٠٠ |
| | | nbine at | | | | |
| | | of transferring | | | | |
| | | ney held seve | | | | ırm. |
| | | to | | | ? | |
| | | accounts | | | | |
| | | dation on how | | | into a | ? |
| Can sugge | st a for m | e 1 | money | firm? | | |
| I assi | stance in | the mul | tiple | _ to your firm. | | |
| Looking for | on transferrin | ig multi | ple to | single | | |
| | to offer a | dvice on merging _ | from | brokers into | consolidated | ? |
| Is | transfer fun | ds from broke | erages | consolidated po | ortfolio? | |

| guidance transferring funds from to consolidated portfolio? |
|---|
| How can investments from to a account? |
| How do I transfer from consolidated portfolio? |
| with transferring funds from multiple your firm. |
| advise on transfer of funds from brokers portfolio? |
| I to several brokerage a portfolio company. |
| Looking for help pooling money across several into |
| Looking pooling held multiple a single investment |
| How do accounts create a portfolio for firm? |
| Would it be possible discuss moving investment them into portfolio at firm? |
| to consolidate investment multiple brokerage accounts into account your? |
| Do know the transfer of funds from your ? |
| Would it you could consolidate investments one account. |
| move investments multiple into a centralized |
| can we investments so become a account your management? |
| Is there advice merging from various? |
| What do to savings distributed several into a ? |
| Can tell to multiple a portfolio with my firm? |
| Is it about merging assets from brokers into ? |
| can I funds a of to consolidated ? |
| there a chance you me transfer money from multiple accounts firm? |
| would likeconsolidatebroker accountsaportfolioyour |
| help me from multiple to a new portfolio firm? have a of funds from various accounts new? |
| to funds from different to portfolio. |
| I am looking information regarding funds brokerages one |
| Can your firm funds brokerages? |
| How moving money from all portfolio? |
| How from multiple to your firm? |
| on of money from brokers your consolidated portfolio? |
| Guidance needed funds that held several |
| you able to tell me can my your ? |
| can help with combining among brokers into consolidated |
| can you help broker a consolidated portfolio? |
| would to from multiple brokers into portfolio with |
| you combine among a brokers into consolidated portfolio? |
| I need on transferring from the portfolio. |
| I'd like to consolidate several brokerage into |
| is funds across several a single portfolio. |
| am information about merging funds multiple central investment |
| can help savings mong portfolio? |
| I need move my from brokerages a |
| to consolidate brokerage into unified portfolio company. |
| Can provide counsel funds to our portfolio? |
| Looking for money held into single investment |
| it you advise the transfer of funds multiple brokers consolidated? |
| can you advise on the of your consolidated? |
| are looking for advice on funds multiple to create portfolio |
| Can my investments from one portfolio? |
| there chance you help funds to a consolidated portfolio with my? |

| can trans | sfer from multipl | le into a | ? | |
|--------------------|------------------------|------------------------|----------------|---------------------------------------|
| Guidance is needed | | across a number | | |
| know | to consolidate | _ brokerage accounts _ | one | _ portfolio? |
| s it | discuss moving | assets and | into | new combined portfolio your |
| Looking for po | oling held | brokerages | one hub at _ | <u>.</u> • |
| Can tell us the | transferri | ng funds from multiple | e | a us? |
| Please tell me how | | to our cons | solidated | _? |
| possible | transfer fro | om a number | a con | asolidated portfolio? |
| for | funds fro | m multiple brokerage | s into ce | entral |
| s it possible | the | from to | your po | rtfolio? |
| | _ about transferring f | funds multiple _ | to a | consolidated portfolio? |
| Can you give us | funds fro | om brokerages to |) | ? |
| you help | consolidate funds | into a ne | ew? | |
| an provide _ | transferring | funds from multiple _ | a | consolidated? |
| can | combining the | of brokers | into one | ? |
| | | | | account your firm? |
| you a | to funds from | multiple a | portfoli | o? |
| suggestions or | n how | various account | ts into a | ? |
| tra | nsfer funds from | accounts a cons | solidated port | folios with? |
| | | | | of a consolidated? |
| ow con | nbine brokerage | accounts into | portfolio v | with? |
| you advise on | | multiplebrokers | your co | onsolidated portfolio? |
| | ur can help | | | |
| | | | | you need advice |
| be able | transf | er from multiple | accounts | consolidated portfolio? |
| | | | | management. |
| | | | | one unified portfolio? |
| | | | | account your? |
| s possible | my | other into one p | ortfolio? | |
| | broke | | | |
| | advice on moving | | | portfolio? |
| d move | from multiple | into a ι | ınder your | · |
| | from b | | | |
| | | | | portfolio? |
| | bı | | | |
| | facilitate | | | |
| | funds | | | |
| | | | | ? |
| | o mul | | | |
| | transfer money f | | | |
| | different | | | |
| | about fund | | central | account? |
| | combine inves | | | |
| | transfer my money _ | | | . |
| | my to | | | |
| | I combine assets | | | solidated portfolio |
| | | | | _ portfolio managed by your? |
| | | | | portiono managea by your: brokers. |
| | endations on how to co | | | |
| 10001111116 | | | | • |

| any that you help transfer funds from multiple a new with firm? |
|---|
| Can help me funds from portfolio for firm? |
| you with transfer of accounts to your own? |
| Is money from multiple brokers your firm? |
| from brokerages to centralized account under your management. |
| would several brokerage a unified for your company. |
| Is to investments multiple one centralized account management? |
| Is it transfer multiple to consolidate into portfolio with ? |
| help pooling money several a single hub. |
| Can I use services to my multiple comprehensive? |
| I transfer multiple brokers consolidate your firm? |
| Are you counsel moving brokerages to a portfolio? |
| make sense combine investments different brokerages management? |
| Can give us any advice multiple to your? |
| like several accounts one with my company. |
| is needed merging held firms into one |
| can help combine distributed among brokers a portfolio? |
| is assets multiple brokerage accounts your firm's |
| like to multiple brokerage accounts into with company. |
| How investments brokerages a single account under management? |
| for pooling from different into a |
| How can I several single consolidated portfolio? |
| help us of funds multiple accounts to create a unified? |
| You be a account and combine holdings at brokers. |
| Can you consolidate brokerage into one your? |
| can we from multiple Brokerages to consolidated? |
| you me funds from accounts to with my firm? |
| Interested in me move money all brokerages you? |
| your help consolidate funds from brokerages? |
| from all a single portfolio with you? |
| You on how to consolidate funds from company's |
| I my from multiple brokerages a account? |
| Can give on brokerages to consolidated portfolio? |
| it from different single portfolio with your firm? |
| Is it possible to combine into portfolio with ? |
| Can you on how investments different into a consolidated portfolio? |
| to move my to a portfolio? |
| We like investments from multiple a account under management. |
| I need from consolidated portfolio my firm. |
| funds from into your company's something that needs |
| do I transfer from several brokerage consolidated? |
| I make it to transfer from firm? |
| Can from brokers to consolidate into portfolio my? |
| I would to transfer from portfolio. |
| to transfer funds brokerages the consolidated portfolio? |
| be to advice from to a fresh combined portfolio? |
| Can us into a new portfolio? |
| Can on transferring from brokerages to portfolio? |
| help pooling money by into investment at your |
| I my funds to single your firm. |
| jour min. |

| Are you to distributed among multiple a consolidated? |
|---|
| Is it to across several a portfolio? |
| there you can help me transfer consolidated portfolio with my firm? |
| is needed for funds brokerages centralized portfolio. |
| you tell me how to consolidate brokerage ? |
| you to discuss various investment assets to new combined by ? |
| it possible to from different brokers for your? |
| I would to broker one unified your company. |
| I about funds from multiple into single investment |
| Can your from multiplebrokerages? |
| possible combine my investment from several into ? |
| Want to move from all of a ? |
| to multiple brokerage a new with your |
| should I my from account under your management? |
| Do have insight funds from multiple a portfolio? |
| I need assistance in transferring funds to consolidated ? |
| I need help funds several brokerages |
| move money multiple brokerage to portfolio your firm? |
| |
| you offer guidance multiple brokerages a consolidated portfolio? |
| might able to advice on different into one consolidated . |
| Looking combining distributed into a consolidated portfolio |
| possible move from multiple brokerages single under your? |
| Help from brokerages to a single you? |
| |
| to give regarding moving from to our consolidated? |
| would to transferinvestments to a your |
| you help bring investments into single consolidated company? |
| It's several brokerages into your company's |
| possible me investments from brokers into one unified? |
| want held in multiple brokerages a portfolio. |
| steps I to move a account under your ? |
| Is to transfer investments brokerages a account management? |
| How about accounts to a for your ? |
| can transfer held at several into portfolio? |
| I our portfolio. |
| If on do that. |
| Is investments broker into single account with firm? |
| How I funds from a single consolidated? |
| Want to move money my brokerages one ? |
| me advice on transferring from multiple to portfolio? |
| Are you to give counsel from multiple portfolio? |
| I to funds brokerages to our |
| possible for your firm investments from different brokers ? |
| give about to consolidate funds multiple accounts portfolio? |
| Can you us how funds from multiple brokerages ? |
| would like to combine several accounts into with |
| to my money from to you. |
| Guidance needed for merging a number a number |
| Please me how to transfer funds several |
| Is possible for firm to consolidate multiple account? |

| I to funds several to our |
|--|
| Where on merging funds from multiple into a? |
| multiple into a single portfolio using your? |
| you offer insight funds from multiple into a ? |
| to know if there are any sources various |
| How move investments from brokerages account? |
| to consolidate brokerage accounts and you. |
| I was curious about investments from to group. |
| Can you me about moving from portfolio under management? |
| How can funds transferred into under management? |
| How I my multiple brokerage into ? |
| To from brokerages your portfolio, advice. |
| to have investments different brokers into a single |
| there recommendation to consolidate different accounts into a ? |
| money from different brokerages to you. |
| do funds from brokerages to firm? |
| it to give counsel funds from to consolidated? |
| How I my investments to one centralized ? |
| Can you counsel on multiple to portfolio? |
| give me recommendations fund sources from different? |
| combine investments from multiple into one ? |
| help me consolidate broker accounts into ? |
| How about transferring assets from brokerage under ? |
| can facilitate the transfer funds from your? |
| |
| I'm wondering can help me funds to consolidated |
| able help consolidate from different brokers one account. |
| need your help the of from create a portfolio your firm. |
| How can into a comprehensive with your? |
| Money transferred from multiple brokers firm. |
| How can combine my accounts using services? |
| Is possible to investments multiple into one your company? |
| Wondering if your firm can help investments different single? |
| you help me multiple accounts to consolidated? |
| is need for advice funds multiple to your |
| How I money broker to you? |
| Can me about from accounts to new portfolio? |
| Are able merging assets different brokers into consolidated? |
| appreciate if you consolidate investments different brokers a |
| you if there are suggestions fund sources different? |
| How transfer investments into one centralized? |
| it transfer brokerages to our consolidated? |
| Looking help pooling money brokerages investment hub. |
| We your advice funds from multiple accounts to firm. |
| We how transfer funds from multiple to create single with |
| possible combine into one consolidated portfolio with your? |
| Would like to investments from brokers into one |
| Guidance needed funds held brokerages one portfolio. |
| us process funds from accounts to create a unified? |
| Do you of helping me funds accounts a consolidated portfolio my? |
| Do have the ability from my to portfolio? |

| You be able | help me or | ening a consolidat | ced | holdings at | |
|----------------------|---------------------|-------------------------------------|--------------------|--------------------------------|--------|
| How do n | | | | | |
| Is possible | _ me to combine _ | investments from | om | one? | |
| possible _ | consolidate | from multiple _ | a | account with your? | |
| need to | from mul | tiple brokerage ac | counts your | | |
| Do you the abil | lity | transfer | brokers to | o your consolidated? | |
| can do | investmen | ts from multiple _ | to a | _? | |
| | _ transferring my i | nvestments from _ | a | partner financial group. | |
| can | investments | that they | _ part of a a | account under? | |
| on assets | brokers | to consolidate | needed. | | |
| it to advis | se | from to | a consolidated po | ortfolio? | |
| any chan | ce you help m | e transfer funds fr | om | portfolio my fir | n? |
| Guidance | in merging | across multipl | e brokerages | portfolio. | |
| There's need _ | on | multiple | brokerages to yo | our company's | |
| you us leg | gal movi | ng from mult | tiple to our _ | ? | |
| If you can help, you | | among several | a | | |
| any | in merging _ | held seve | eral brokerages? | | |
| | _ accounts be | into a comprehen | sive portfolio? | | |
| I to move | multiple | e brokerages to a $_{	ext{	iny -}}$ | • | | |
| I was about mo | oving | brokers | a single | group. | |
| s possible | my | several brokers | a por | tfolio? | |
| help moving r | money all | _ brokerages | single | <u>.</u> | |
| can help | fro | m multiple broker | s a poi | rtfolio? | |
| should I combi | ne money | into o | consolidated | with your? | |
| Do you need | transferring | from several | cor | mpany's? | |
| you to | | from multiple bro | kers to cons | olidated portfolio? | |
| Can I you move | e from | brokerages | one? | | |
| need to move | from | acco | ount. | | |
| Can provide | transferri | ng funds from | to | consolidated portfolio? | |
| there way | y transfer mor | ney multiple l | orokers | firm? | |
| Guidance in me | | | | | |
| will: | ing to help | investments | different broke | erages into a? | |
| | idate funds from | | company' | s | |
| How do I | | | | | |
| | help tr | ransfer funds | multiple account | s a consolidated portfolio wit | n my _ |
| | the savings | | | | |
| We advice on t | ransferring | multiple | one ur | nified with firm. | |
| mov | ve investments | s to a centralized a | ccount under | ? | |
| for | | | | | |
| | | | | folio your firm? | |
| | | | | _ consolidated? | |
| | | | | your portfolio? | |
| would to | | | | | |
| want to | | | | | |
| | r | nultiple to a | single account un | der your management? | |
| move | my brokera | ges to portfo | lio? | | |
| Is for | | the transfer of fund | ds from multiple l | orokers your | |
| Is there a chance | helping me | e funds | accounts to | consolidated with | ? |
| it to trans | sfer money from | | _ into a | with your? | |
| can I | money from | brokers to _ | portfoli | 0? | |

| Would it | to _ | invest | ment assets to | | managed _ | your firm? |
|--------------|---------------|-----------------|-----------------------|-------------|--------------------|-----------------------|
| Can | us | moving | multiple brokerag | res to | consolidated | _? |
| Is | | combine my inv | estments from | into _ | portfolio? | |
| a | ble to advise | e on f | rom brokers to | | portfolio? | |
| can | transfer | held in | _ brokerages | consol | lidated portfolio? | |
| le | et | how cons | olidate from | account | ts into new | portfolio? |
| Assets can b | e transferre | d from | | compa | ny. | |
| Would appre | eciate it | could | me consolidate | in | to a accoun | t |
| should | I transfer _ | severa | l our cons | solidated _ | ? | |
| How can you | ı help | savings | in | nto si | ngle portfolio? | |
| | | | brokerag | | | |
| can | transfer | | several into a c | consolidate | d portfolio? | |
| Transferring | [†] | multiple broker | ages consolidat | e into your | company's | · |
| | | | iggestions | | | |
| it poss | ble | can help me | from mult | tiple t | to the consolidate | ed portfolio? |
| | | | from bro | | | |
| | | | ging assets from | | | olidated? |
| it nece | ssary | from | several brokerages to | o our | ? | |
| | | | investments m | | | gle portfolio? |
| I | transfer | from multiple | brokerages a _ | ? | | |
| | | | s by | | | |
| | | | accounts | | | |
| | | | thang | | | |
| | | | multiple brokerag | | | ? |
| | | | tiple brokerages | | ? | |
| | | | ges a | | | |
| | | | gle with? | | | |
| | | | ccounts | | | vices? |
| | | | okers to a | | | |
| | | | commendations | | | |
| | | | | | | a portfolio with our |
| | | | okerages a cons | | | |
| | | | ributed by | | | |
| | | | | | o porti | folio firm? |
| | | | brokerages to | | | |
| | | | iple brokerages | | | |
| | | | ing from l | _ | | |
| | | | differe | | | |
| | | | multiple | | | _? |
| | | | gether dif | | | |
| | | | s to into your co | ompany's _ | W1ll | · |
| | | ny from | | | . 6. 11 | |
| | | | _ transferred yo | | | |
| | | | om to a ne | | | |
| | | | onsolidate funds from | | | |
| | | | in accoun | | | company. |
| | | | accounts inves | | | |
| | | | accounts a _ | | | concelidated account? |
| | | | | | | consolidated account? |
| 10u ad | ATC6 | s | everal brokerages _ | your co | mpany s portion | J. |

| | d it to assets and merging into new portfolio managed firm? |
|---------|---|
| | able investments from brokerages into a single portfolio? |
| Trans | sferring several brokerages to consolidate company's requires |
| I'd | consolidate several unified portfolio with company. |
| | you any suggestions on fund sources ? |
| I wan | nt to into one portfolio your |
| Want | t to transfer from to ? |
| | d your transferring funds from our |
| | ance needed for funds several . |
| | want to funds brokerages to firm. |
| | to know how to from to our consolidated |
| | help us with process funds from brokerages portfolio? |
| | possibleyou to offeronassets frombrokersa? |
| | transferring funds from brokerages a new portfolio? |
| | from multiple accounts to a consolidated? |
| | you give us our from different a single ? |
| _ | to transfer from several our consolidated ? |
| | can funds several to consolidated ? |
| | you assist combining distributed among brokers a consolidated? |
| | |
| | transfer funds from broker a portfolio your firm? |
| | |
| | was curious moving several brokerages to a single |
| | like to transfer funds from brokerages consolidated portfolio. |
| | can I brokerages to a? |
| | on from brokers consolidate them be appreciated. |
| | to transfer funds held into consolidated? |
| | to several accounts into portfolio company. |
| | possible that I my investments from one portfolio? |
| | ance is needed held brokerages. |
| | my investment in one single account with your? |
| | need your on transferring from multiple brokerages consolidated? |
| | possibleyou toadvice from different brokers consolidated account? |
| | can you among brokers into consolidated portfolio? |
| Need | advice on funds from your |
| Reco | mmendations transferring from brokers consolidate them within company |
| | possible for me transfer funds to our portfolio? |
| | you give some moving from multiple to portfolio? |
| | guys need advice funds a new profile. |
| | possible I should transfer funds from our consolidated? |
| Is it p | possible move money all to portfolio ? |
| | there anything you to transfer multiple accounts a with my? |
| | move my investments from multiple brokerages account? |
| Can _ | me how consolidate funds into a portfolio? |
| | do I transfer money from accounts into consolidated ? |
| | you help funds multiple accounts a portfolio firm? |
| | help combining savings distributed into portfolio? |
| | for help pooling money into one investment |
| | you advise on the funds from broker to consolidated? |
| | guidance moving from brokerages to our consolidated? |
| | I move investments brokerages a account under management? |
| | a a a a a a management. |

| your provide for investments different brokerages into portfolio? |
|---|
| can transfer different brokerages to firm? |
| Guidance is funds held several one portfolio. |
| you interested in move all my to a ? |
| How can brokers to my firm? |
| Should ask to funds to our portfolio? |
| you consolidation funds from brokerages? |
| Would to advice on merging from different one account? |
| Would possible to advice on assets brokers into account? |
| How transfer my brokerage to with? |
| I would you could me my investments a your |
| way to transfer funds from accounts consolidated portfolio? |
| combine money multiple accounts single consolidated portfolio? |
| can we combine assets in accounts consolidated? |
| |
| Can you give how to brokerages? |
| you willing to discuss moving new combined managed your firm? |
| Is to my several into one portfolio? |
| I need help with multiple into a with with |
| How transfer our to that we can have consolidated account? |
| Wondering if the consolidation of investments different into ? |
| Can help among many brokers a consolidated? |
| Do assistance moving from my to you? |
| Can you with process funds from multiple to one ? |
| Is possible to funds multiple to portfolio with ? |
| Can provide insights about funds multiple brokerages into ? |
| Can you help how money your firm? |
| I transfer money from brokers your for ? |
| You might be to help me transfer from to to with firm. |
| Looking help pooling money across several brokerages single firm. |
| How money from multiple to consolidated with your? |
| Will be any fund from brokers? |
| Can you help our from accounts to a ? |
| |
| you tell to to with my firm? |
| I'd like consolidate several broker portfolio with |
| Guidance needed for funds into a centralized |
| Is possible advise on funds accounts portfolio with firm? |
| Do have any advice sources brokers? |
| Is you me move from multiple to consolidated portfolio? |
| Do have on how to amalgamate sources ? |
| should be brokers to consolidate in your |
| can we our from multiple brokerages that a account? |
| good idea funds from brokerage accounts into portfolio? |
| you us about funds from multiple brokerages consolidated? |
| in merging funds held brokerages. |
| |
| I would love to you move one |
| |
| possible to multiple to our consolidated portfolio? |
| possible to multiple to our consolidated portfolio? Is it to give regarding multiple brokerages a ? |
| possible to multiple to our consolidated portfolio? Is it to give regarding multiple brokerages a ? seek your advice transferring funds from several brokerages ? |
| possible to multiple to our consolidated portfolio? Is it to give regarding multiple brokerages a ? |

| If want consolidate funds from multiple advice transferring |
|---|
| Looking on transferring assets your company. |
| How investments from a centralized under your management? |
| need help transferring multiple to my |
| Can you on transfer of broker consolidated? |
| you interested my brokerages to portfolio with? |
| is needed merging funds held by centralized |
| there chance help me money from a consolidated portfolio? |
| How can multiple brokerage into comprehensive with your? |
| Are you to guidance how funds from multiple into ? |
| I would brokers to consolidate with firm. |
| suggestions how to different accounts single portfolio? |
| to advise on the funds from multiple consolidated portfolio? |
| can you savings distributed among multiple into consolidated |
| looking for transfer funds from multiple accounts to portfolio with firm. |
| Guidance needed for funds held brokerages into |
| Can you help me with funds from management? |
| give on funds multiple to a consolidated portfolio? |
| Is any on fund sources from ? |
| can we quickly our investments multiple account? |
| assist in transferring funds from to firm? |
| I'd several broker accounts a single with |
| |
| Transferring funds frombrokeragesconsolidateyourportfolio is advice |
| it consolidate investments multiple a account managed by firm? |
| We need advice how from multiple a unified with your |
| Is it to money my to one ? |
| I need there are any on sources brokers. |
| I wondering there were any merging from different |
| Is to transfer money from brokerages one portfolio ? |
| Looking for money held across several into |
| you able give counsel funds from brokerages portfolio? |
| How transfer from multiple accounts to one your? |
| possible combine from brokers into a single portfolio? |
| if your bring investments different brokerages into a ? |
| $Would \underline{\hspace{1cm}} it \underline{\hspace{1cm}} could \underline{\hspace{1cm}} consolidate \underline{\hspace{1cm}} from \ different \underline{\hspace{1cm}} into \underline{\hspace{1cm}} single \underline{\hspace{1cm}}.$ |
| like to funds from accounts to consolidated portfolio assistance. |
| We want to transfer from brokerages account under |
| $I \ ___________________________________$ |
| a idea to transfer from several brokerages a portfolio? |
| for assistance several brokerages into hub at your |
| Can help consolidate brokers? |
| recommendation to consolidate various brokerage into new portfolio? |
| help us the process of multiple into a portfolio? |
| you be able to merging assets brokers? |
| it possible to my from a portfolio? |
| you help funds Brokerages? |
| might be to advise on the of brokers portfolio. |
| How combine money multiple accounts into a your ? |
| it possible money all my brokerages to ? |
| for help multiple brokerages one investment hub. |
| |

| Would be you to with your investment to a new? |
|--|
| you to consolidate accounts into new portfolio? |
| for help money multiple brokerages one |
| How should I from into portfolio with firm? |
| you willing move money from to one me? |
| Is there recommendation on merging fund ? |
| Is your to help bring investments different brokerages ? |
| funds from brokerages your company's portfolio |
| it to advise on the transfer from your ? |
| I move my from a single your management. |
| you with combining the of broker into a ? |
| |
| Guidance is funds several brokerages |
| |
| Can help consolidate brokerage accounts into ? |
| I trying consolidate my in brokerage one your company. |
| Is it for your firm help from ? |
| I move investments from multiple a single account? |
| us moving funds from multiple to consolidated? |
| help savings among multiple brokers into portfolio? |
| Is any you can help transfer funds into a portfolio my? |
| a for advice on transferring from company's |
| I to funds to our consolidated |
| How transfer our investments brokerages to consolidated? |
| transfer from several broker accounts to consolidated? |
| it to different brokerages one portfolio with firm? |
| can we transfer investments from more broker a? |
| Do you have recommendations fund different ? |
| Is possible to move from all to single portfolio ? |
| Is any for funds from brokerages to ? |
| you help with process of from one unified portfolio? |
| want know transfer funds from one portfolio with your. |
| |
| Is it to my from brokers portfolio? |
| |
| I know any recommendations on fund sources different |
| can multiple brokers a new firm? |
| possible my investments from broker one unified? |
| it to advice from brokers a consolidated account? |
| you advice on transferring funds several to portfolio? |
| there any chance me transfer funds from accounts to with company? |
| Guidance for from multiple brokerages into centralized |
| it to give advice merging assets from into ? |
| it to combine more than broker into one? |
| is guidance for merging across multiple |
| there a you can me funds from multiple to consolidated company? |
| you help combining savings of brokers single portfolio? |
| Can you my company how from accounts new? |
| |
| pooling held across brokerages into hub firm |
| pooling held across brokerages into hub firm Guidance is for merging held |
| |

| Is there any help transfer funds from accounts consolidated with firm? |
|---|
| $I \ \underline{\hspace{1cm}} like \ \underline{\hspace{1cm}} know \ \underline{\hspace{1cm}} can \ help \ me \ transfer \ funds \ \underline{\hspace{1cm}} brokerages \ \underline{\hspace{1cm}} consolidated \ \underline{\hspace{1cm}}.$ |
| I about moving my investments brokers to partner |
| Would be discuss moving investment assets a portfolio by ? |
| to funds several to our consolidated portfolio? |
| curious moving my to a single-partner group. |
| consolidate investments from into one account. |
| I transfer money from to account? |
| to to funds from multiple accounts to consolidated portfolio with my? |
| how to consolidate funds from into a new portfolio? |
| How can help combine savings into consolidated |
| Looking money across into one investment |
| Is it possible for me to funds portfolio? |
| Guidance needed held brokerages into single portfolio. |
| like to accounts into one portfolio company. |
| looking for information about merging funds brokerages one |
| to move from multiple brokerages your |
| combine investments different broker's under your? |
| moving funds multiple to a portfolio? |
| Is it possible help from brokerages to your? |
| to transfer between brokerages and a ? |
| To funds brokerages into your portfolio need |
| you offer to funds ? |
| can transfer from one another that can have a account you? |
| there chance transfer funds multiple accounts consolidated portfolio with my firm? |
| help with the of transferring multiple a unified portfolio with firm. |
| I combine my several into consolidated your firm? |
| How can funds held multiple a portfolio? |
| Looking on multiple brokers to a company. |
| How should I my from to to? |
| How do investments brokerages into centralized? |
| How do move money multiple accounts portfolio with ? |
| help held across several brokerages into investment hub your |
| Can you funds from brokers to the ? |
| for assistance with combining savings distributed among into a into a |
| do to investments multiple brokerages into centralized? |
| is needed in funds across several into |
| transferring funds from accounts your firm. |
| about combining brokerages under your? |
| |
| your advice on to funds from multiple to a with your |
| your advice on to funds from multiple to a with your we transfer our consolidated so they become part management? |
| |
| we transfer our consolidated so they become part management? it possible combine from brokers a single ? |
| we transfer our consolidated so they become part management? it possible combine from brokers a single ? it possible merging brokerage accounts into single ? |
| we transfer our consolidated so they become part management? it possible combine from brokers a single ? it possible merging brokerage accounts into single ? have any experience amalgamating funds from consolidated portfolio? |
| we transfer our consolidated so they become part management? it possible combine from brokers a single ? it possible merging brokerage accounts into single ? |
| we transfer our consolidated so they become part management? it possible combine from brokers a single ? it possible merging brokerage accounts into single ? have any experience amalgamating funds from consolidated portfolio? Can help from more than one ? |
| we transfer our consolidated so they become part management? it possible combine from brokers a single ? it possible merging brokerage accounts into single ? have any experience amalgamating funds from consolidated portfolio? Can help from more than one ? you recommend way consolidate funds various accounts a ? |
| we transfer our consolidated so they become part management? it possible combine from brokers a single ? it possible merging brokerage accounts into single ? have any experience amalgamating funds from consolidated portfolio? Can help from more than one ? you recommend way consolidate funds various accounts a ? Does your firm investments different single portfolio? |

| How | inv | restments from sever | al brokerages to | | _? | | |
|-------------|----------|-----------------------|-------------------|-----------------|--------------------|----------------|------------------|
| Can he | elp | funds from m | ultiple brokerage | es co | nsolidated | _ under n | nanagement? |
| l: | ike to n | ny investments from | multiple to | centralize | ed | manageme | nt. |
| there | suggest | ion how to | _ fund from | different | ? | | |
| | | about moving fu | | | | | |
| | | give advice on | | | | unt? | |
| | | from multiple | | | | | |
| | | _ from account | | | | | |
| | | offer r | | | ? | | |
| | | nds broke | | | | | |
| | | how to amalgamate | | | | 10.11 111 | 2 |
| | | transfer f | | | | | my? |
| | | help transfer | | | | | |
| | | dance on l | | | ilito a collsolluc | itea portiono: | |
| | | funds mul | | | for your | 2 | |
| | | vestment in multiple | | | | | |
| | | al brokerage accoun | | | | | |
| | | transferring fi | | | | <i>y</i> • | |
| | | ng investments | | | | | |
| | | process of | | | | ed portfolio | your firm. |
| | | assets f | | | | | |
| | | n | | | | ortfolio n | ny firm? |
| | | tion merging _ | | | | | |
| Do you have | e (| on source | s different _ | ? | | | |
| I | to | _ brokerage int | o a portfoli | o for comp | pany. | | |
| Is | _ chance | you me | transfer fro | om accour | nts a new | portfolio | my firm? |
| We loo | oking ac | dvice on transferring | | accounts to cre | eate | for your | · |
| | | transfer funds | | | | | |
| | | _ the transfer of fun | | | | with? | |
| | | h combining savings | | | | | |
| | | from several | | | | 1.1. | |
| | | advise the t | | | | | 1? |
| | | ansfer from | | | | firm? | |
| | | nsfer from | | | 1.? | | |
| | | s _ brokerage | | | our company | | |
| | | into | | | | olio2 | |
| | | the | | | | | |
| | | estments multip | | | | | |
| | | | | | | | rtfolio with my? |
| | | broker in | | | | onoonaaoa po | |
| | | e on transfer | | | | ed ? | |
| | | about funds | | | | | |
| | | offer advice or | | | | | |
| | | tr | | | | nsolidated por | tfolio? |
| | | moving fu | | | | | |
| | | from multiple | | | | | |
| | | on the transfer | | | | | ? |
| you | | give advice on mer | ging assets to | W | vith comp | any? | |

| You guys advice on numerous a new |
|---|
| help money brokerages into one investment hub. |
| necessary for guidance in funds across |
| Some tips on shufflin' cross various into into |
| Can give us on to funds from accounts a ? |
| Do you want help multiple brokerages? |
| be possible to discuss investment into a new by firm? |
| give advice on how funds from brokerages portfolio? |
| I would like consolidate accounts unified with company. |
| I to my a with your firm. |
| find merging from multiple brokerages one account? |
| would know there are fund sources from various brokers. |
| able to insight multiple to a consolidated portfolio? |
| you us funds multiple brokerages to your ? |
| You may able to help me transfer from multiple to portfolio |
| Would investments from multiple into a single account. |
| for assistancedistributed among numerous into consolidated |
| Will you be able tell me transfer various accounts to ? |
| How I to consolidate with ? |
| |
| How you assist in combining savings into a ? |
| want to consolidate from several brokerages, ask |
| information about merging funds multiple brokerages into ? |
| Is can help transfer funds accounts firm's consolidated portfolio? |
| you to funds your portfolio you need |
| Is any on the from brokers? |
| Is it give funds from multiple to portfolio? |
| help us with moving funds from to consolidated under ? |
| Can you insight on to from to portfolio? |
| your offer support in together from a portfolio? |
| you to give guidance how consolidate from multiple portfolio? |
| combine my a portfolio using services? |
| you to funds from should seek advice. |
| Do know advise on transferring from to a consolidated? |
| you help me with the transfer of accounts a? |
| I'm looking to $___$ several brokerage $___$ $___$ portfolio $___$ company. |
| How assist with combining distributed among into a? |
| Do have with funds from brokerages consolidated portfolio? |
| is needed for several one centralized portfolio. |
| Looking assistance savings distributed among into consolidated |
| transferring funds from to create a unified with |
| How do I my to you? |
| Looking help money from brokerages investment |
| advice about from multiple to your consolidated? |
| Is there way funds several brokerages to ? |
| I need transferring from multiple accounts to a with |
| can transfer investments several brokers a account? |
| to transfer brokerages your portfolio? |
| consolidate my into one account with your? |
| I my multiple brokerage into one for your company. |
| How I move money accounts to a with ? |
| 110 1 110.10 110.10 1 4000 41110 10 4 WINI : |

| transfer money multiple brokers to with your firm. |
|--|
| can transfer your so they become part of consolidated? |
| needed in merging funds portfolio |
| I am you can me funds to consolidated |
| I want funds from multiple to the at |
| I the funds from multiple to your |
| Is to discuss with moving investment a new managed firm? |
| across several brokerages should merged a |
| can I brokers to new portfolio with you? |
| |
| it necessary for funds brokerages to our consolidated? |
| Is it that your company can of moving my ? |
| can combine multiple brokerage accounts portfolio with? |
| Transferring funds from brokerages to company's need need |
| Looking for help money brokerages investment at firm. |
| You may be able multiple accounts to consolidated with my |
| wish to consolidate investments a single your firm. |
| I would my brokerage into a with company. |
| helping people consolidate from multiple brokerages? |
| I am looking about from into single account. |
| I would like to in multiple accounts into one |
| There $____$ for guidance $___$ merging $___$ held $___$ multiple brokerages. |
| How can the many brokers into consolidated portfolio? |
| I need combining investments into one |
| How we transfer funds to portfolio ? |
| can facilitate transfer money multiple brokers to a ? |
| it possible to transfer from brokerages to ? |
| help pooling money brokers into one hub. |
| Are to us multiple brokerages our consolidated portfolio? |
| it to transfer from into new portfolio for ? |
| therechanceyouhelptransfer funds fromtoportfoliomy firm? |
| Is possible to with merging various portfolio? |
| is funds held across different brokerages a |
| |
| I like to transfer multiple consolidated for firm. |
| Is possible to transfer into single firm? |
| Is it possible for you consolidate money with ? |
| you have knowledge on transferring from multiple consolidated? |
| I help combining my multiple into portfolio? |
| I would it could help consolidate investments from brokers |
| from all my to portfolio with you? |
| consolidate funds different brokerages? |
| possible to handle moving my to pile? |
| help combine distributed various brokers into portfolio? |
| you be offer on merging from brokers? |
| Is there anything you me transferring funds consolidated portfolio? |
| Can you give any advice on from portfolio? |
| Can tell about from brokerages to portfolio? |
| Guidance is merging funds held across brokerages portfolio. |
| is need for how to funds from |
| I able to combine from brokers portfolio? |
| can we transfer a consolidated account at ? |
| |

| There is | need for | advice | _ funds | to a | · | | |
|--------------|--------------|------------------|-----------------|-----------------------|---------------|----------------------|-------|
| | give guidar | ice on amalgamat | ing funds from | brokerages _ | | portfolio? | |
| | to mo | ve | _ brokerages _ | a single accoun | nt under | management. | |
| Guidance is | s for _ | from | brokerages | portfoli | 0. | | |
| What can _ | to | o help us | from c | lifferent accounts _ | a | ? | |
| How do | | several _ | to | consolidated | for your firr | n? | |
| What | should I | to move | investments _ | multiple | a | ? | |
| Is it to | o my _ | | into one u | nified? | | | |
| you gi | ive us | on | multiple bro | okers your | _ portfolio? | | |
| ! | help r | nove money | firm? | | | | |
| How v | we transfer | | several | they become | me of | consolidated acc | ount? |
| for | funds _ | several | into a | portfolio? | | | |
| How | move | investments | multiple | one centralize | ed under | your? | |
| is a | that | can help | funds | into _ | consolida | ted portfolio with _ | firm. |
| I need | to tr | ansfer | brokerag | ge accounts to | · | | |
| Is it necess | ary for | | from bro | kerages to the | ? | | |
| Is there a _ | n | nerging sou | rces | brokers? | | | |
| Is there any | <i>y</i> | fund: | s from | to consolid | ated with | your? | |
| | | | | kerages into | | | |
| is | me | rging held b | y multiple brok | cerages | portfolio. | | |
| | | | | one portfolio? | | | |
| Can you he | lp us with _ | | | to create a un | nified? | | |
| | | | | | | with firm | 1. |
| | | | | to your | | | |
| | | | | to a single | | | |
| | | | | single portfolio w | | • | |
| want | to | brol | kers to a new p | ortfolio for | | | |
| | | | | ous into a | | | |
| | | | | | | | |
| | | | | ges into a single | | | |
| | | funds | | | | | |
| | | | | a centralized p | oortfolio. | | |
| | | | | a unified po | | our firm? | |
| | | | | ts to a portfoli | | | |
| | | | | one portfol | | | |
| | | | | g funds to | | with firm? | |
| | | | | | | investment accou | nt? |
| | | | | _ multiple brokers | | | |
| | | | | o company. | | _ . | |
| | | | | ıltiple to a | partner. | | |
| | | | | different | | | |
| | | | | a single acco | | | |
| | | brokerage a | | | , 41101 | | |
| | | | | ints into | with con | nany | |
| | | | | to a new | | -p-411.j. | |
| | | | | | | consolidated | ? |
| | | | | to our | | 55113511441644 | -• |
| | | | | to our accounts to | | n with my 2 | |
| | | | | om brokerage: | | | |
| | | | | | | | |
| to co | moonaate - | II | rarabie niokelg | age accounts into or | 10 | · | |

| you be able to me of funds from accounts portfolio? |
|---|
| Is possible from my brokerages single portfolio with? |
| at your firm? |
| How do money from into consolidated portfolio for ? |
| need help combining my from brokers portfolio. |
| How combining savings of numerous brokers portfolio? |
| transferring funds from multiple accounts to create one? |
| it possible your handle the large moving one pile? |
| Guidance needed held across brokerages. |
| you give transferring from multiple brokerages single portfolio? |
| assistance pooling brokerages into one investment hub. |
| can find information regarding merging funds brokerages into ? |
| I like from brokerages a consolidated |
| give any on moving from multiple consolidated portfolio? |
| How multiple be merged into a comprehensive portfolio ? |
| $____ looking ____ information on ____ funds ____ multiple brokerages ____ one ____ investment ___\$ |
| Your might be consolidate from brokers single account. |
| Is it advice on the transfer brokers your portfolio? |
| need consolidate several brokerage accounts into portfolio. |
| bring all our different accounts single consolidated at your company? |
| if firm could various brokers into a single account. |
| was curious moving my from a single-partner financial |
| possible to investments different brokers a single your firm? |
| Where can I learn merging from central investment? |
| How should transfer multiple brokerages account? |
| to brokers to consolidate into new portfolio with firm. |
| you offer on to a consolidated portfolio? |
| How do from several brokerages to a ? |
| should my funds from different brokerages your? |
| Looking for assistance a multiple brokers a portfolio. |
| How do I combine money consolidated for my? |
| Is it to from several ourConsolidate? |
| Is to several accounts a new? |
| I need move multiple brokerages to single account |
| help us with brokerages to our consolidated portfolio? |
| If to funds brokerages, need advice. |
| Is your firm willing help investments from different single? |
| Is necessary to assets multiple accounts firm's? |
| possible you help me to funds from multiple a portfolio firm? |
| money from establish a new portfolio your firm? |
| Is on from multiple accounts into new portfolio? |
| Need advice how from brokerages. |
| be to transfer funds from multiple consolidated portfolio my firm? |
| you with the savings of into a portfolio? |
| How you help numerous brokers into portfolio? |
| I if you could help from brokers one |
| help savings distributed among numerous consolidated portfolio? |
| you on transferring funds multiple brokerage to consolidated portfolio? |
| you give us guidance how our investments consolidated portfolio company? |
| assets accounts to under your firm's |

| Can help with savings distributed among into? |
|---|
| Is it possible to brokerage accounts a consolidated portfolio ? |
| Is any advice on sources from brokers? |
| Looking one combined hub |
| there a you could help multiple a portfolio with my firm? |
| We're looking for from accounts a unified with your |
| can moved all my brokerages portfolio with |
| How our a account that under your management? |
| Looking help distributed among brokers into a |
| Can you give us on to unify different accounts ? |
| Transferring funds from several brokerages company's a |
| Wondering firm bring from brokerages into a consolidated? |
| Can provide on to transfer from multiple new consolidated? |
| Are you able to give advice transfer funds multiple create unified? |
| is merging funds across brokerages. |
| Would appreciate help consolidate from various brokers into |
| need help money from my portfolio with ? |
| How can I my funds ? |
| Imultiple accounts one consolidated with your company? |
| possible to transfer funds multiple into a ? |
| be investment assets to a new combined portfolio firm? |
| Wondering your firm you together different brokerages? |
| What can you to brokers into a portfolio? |
| transferring assets brokerage to under umbrella? |
| be able to help with transfer various into fresh portfolio? |
| Does anyone recommendations merging fund from ? |
| for funds held across brokerages portfolio? |
| facilitate money from multiple brokers firm? |
| way combine investments from different your management? |
| Can you explain us to brokerages a portfolio? |
| us on how to amalgamate funds brokerages? |
| I transfer from multiple broker to account ? |
| |
| you help us with theoffromaccountsaportfolio? |
| should transfer from accounts consolidated with your firm? |
| are looking on how to transfer funds from accounts your firm. |
| We need advice transferring funds from to a firm. |
| want to investments from brokerages a under your |
| is need transferring from several to your company's |
| funds several brokerages to our portfolio? |
| possible to advice on assets brokers into single account? |
| to investment in accounts into one your company. |
| I need my different brokerages you. |
| Is transfer money from to into a new? |
| you on the transfer funds from to portfolio? |
| advice transferring from several brokerages my company's |
| provide advice transferring funds multiple a single portfolio? |
| transfer funds several to consolidated portfolio? |
| like how funds multiple brokerages our consolidated portfolio. |
| Can you advise on funds brokers portfolio? |
| can we transfer to portfolio? |

| appreciate if y | | if your | could | 1 | from differe | nt broker | s into a | · | .• | |
|-----------------|------------|-----------------|-------------------------|---------------|--------------|-------------|------------|------------|------------------|----|
| Will you help | | | from several brokerages | | | | portfolio? | | | |
| | able to | help sav | ings distribut | ted among _ | brokers | a | | _? | | |
| | | how | transfer fund | ls from | brokerages | to a | portfo | lio? | | |
| th | nere | that you | help | _ to fur | nds from | t | 0 | portfo | olio with my fir | m? |
| Is it | | from | brokers | into one acc | ount y | our |) | | | |
| Can yo | u | _ transfer | | broker accou | nts m | y firm? | | | | |
| | to | transfer | _ from b | rokers | a new portf | olio with | ? | | | |
| it | | on the t | ransfer from | brokers | your | consolida | ted | _? | | |
| How ca | an tra | nsfer money _ | multiple | yo | our in | to _ | ? | | | |
| | u | s insight on tr | ansferring | from mult | iple | a new | · | ? | | |
| Is there | e = | | from | _ my brokera | ges to one | ? | | | | |
| | m | ie | from mu | ltiple broker | age account | s m | y firm? | | | |
| How _ | I | one | e to anot | ther in p | ortfolio? | | | | | |
| Can | | about tran | sferring | from multipl | e accounts | | | account wi | th firm? | |
| | I move | investments _ | bro | kerages into | single | e? | | | | |
| is | · | he | eld across | _ brokerage: | s into a | _ portfolio |). | | | |
| Will | be | to my _ | seve | eral | one portf | olio? | | | | |
| Is | possible _ | func | ls : | brokerage ac | counts | _ a new | ? | | | |
| Is it | tra | nsfer | brok | erages to ou | r portf | olio | | | | |
| | w | ith proc | ess of transfe | rring funds _ | multiple | e to | create | unifie | ed with | |