

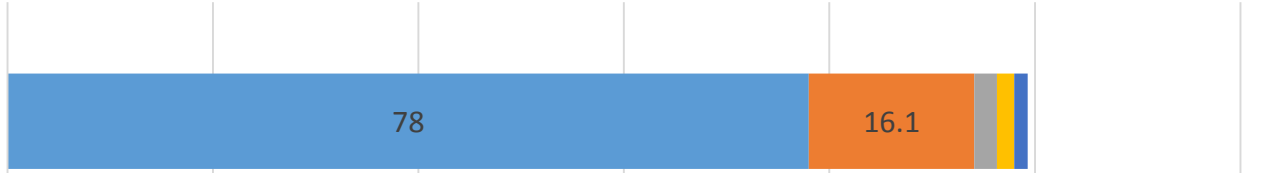


Service Quality: Annual Client Survey Results 2019

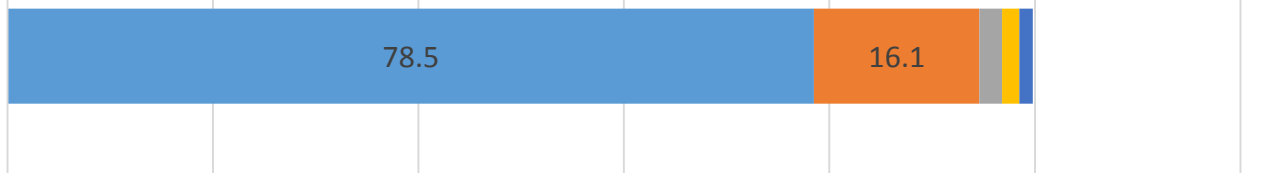


My financial advisor...

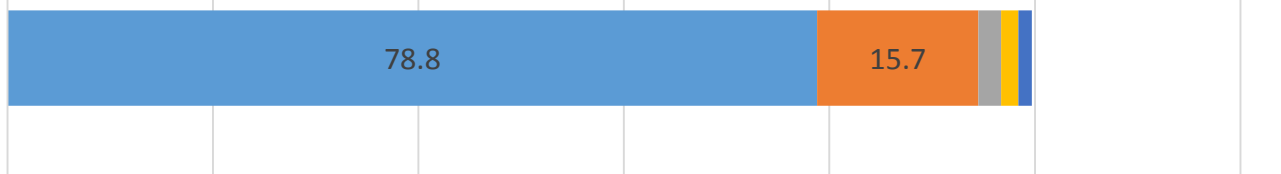
Is in touch with me frequently enough to know and meet my needs.



Listens to me and understands my needs before proposing a solution.



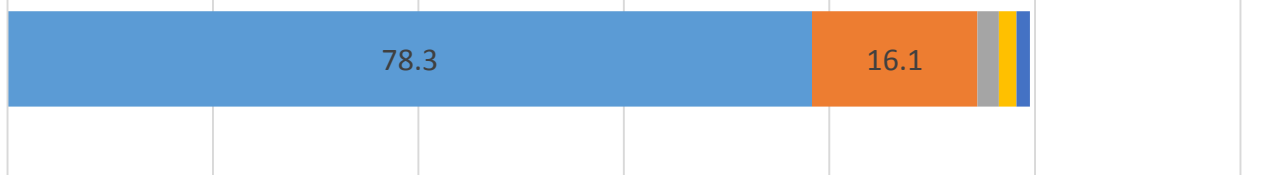
Involves other specialists when needed to ensure I get the best advice.



Introduces me to others including key decision makers to ensure I will be taken care of in his/her absence



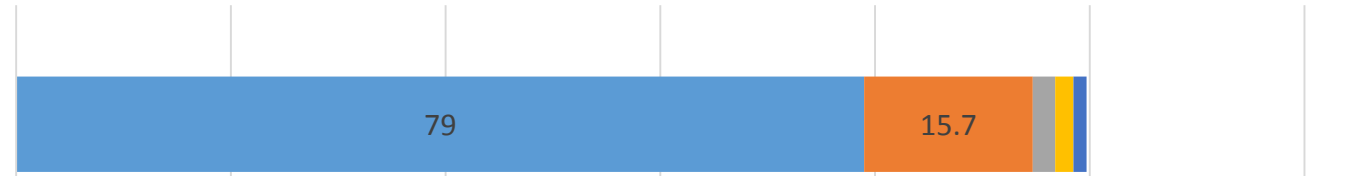
Demonstrates knowledge and experience necessary to meet my needs.



■ Strongly Agree ■ Agree ■ Sometimes Agree / Sometimes Disagree ■ Disagree ■ Strongly Disagree

My financial advisor...

Provides me with knowledge and creative insights that I would not have had without him/her.



Generally offers several workable solutions.



Makes proposals that are generally responsive to my needs.



Provides timely responses to my requests.



Follows up to ensure that things have happened as they should have.



■ Strongly Agree ■ Agree ■ Sometimes Agree / Sometimes Disagree ■ Disagree ■ Strongly Disagree

My financial advisor...

Ensures accuracy in all our work.

78.6

16

Makes me aware of potential problems before they become real problems.

78.8

15.8

Delivers against his/her commitments.

78.7

16

Is recognizably better than his/her competitors.

79

15.7



0 20 40 60 80 100 120