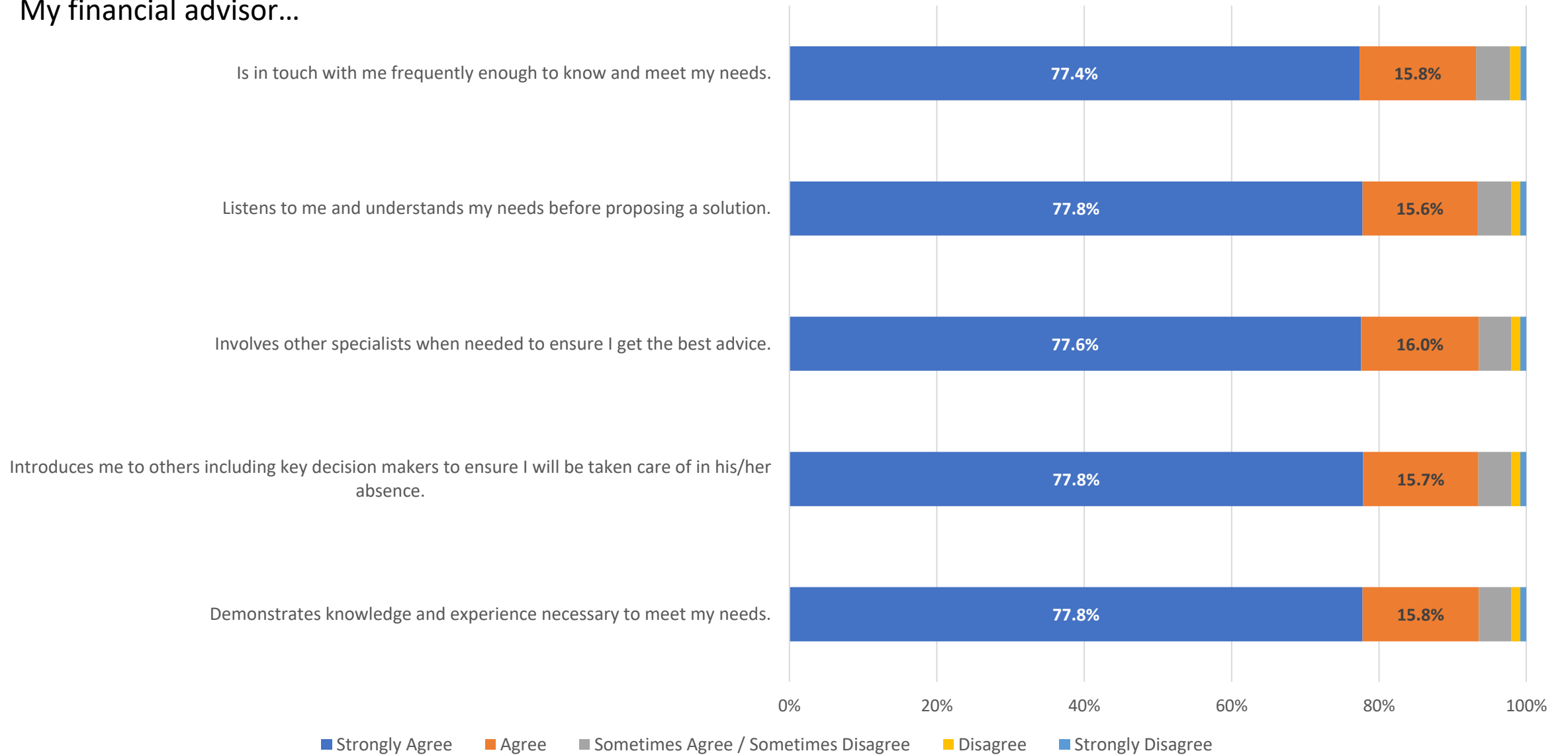


Service Quality: Annual Client Survey Results

2022

My financial advisor...



My financial advisor...

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

77.9%

16.0%

Generally offers several workable solutions.

77.9%

15.8%

Makes proposals that are generally responsive to my needs.

77.8%

16.0%

Provides timely responses to my requests.

77.9%

15.6%

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

77.8%

15.9%

0% 20% 40% 60% 80% 100%

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

My financial advisor...

