



Service Quality: Annual Client Survey Results 2020



My financial advisor...

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

75.4%

17.6%

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

75.8%

17.5%

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

75.9%

17.5%

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

76.1%

17.1%

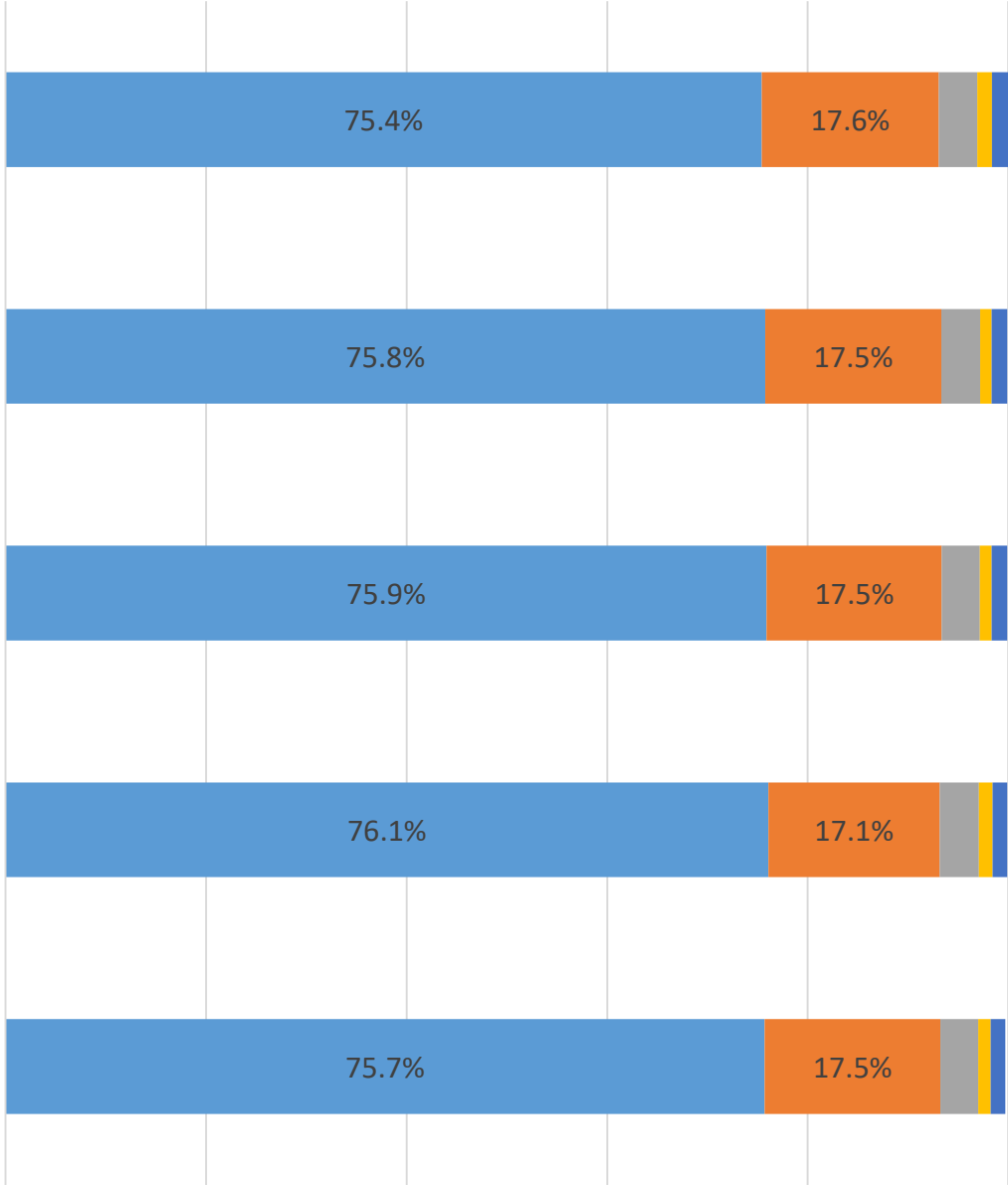
Demonstrates knowledge and experience necessary to meet my needs.

75.7%

17.5%

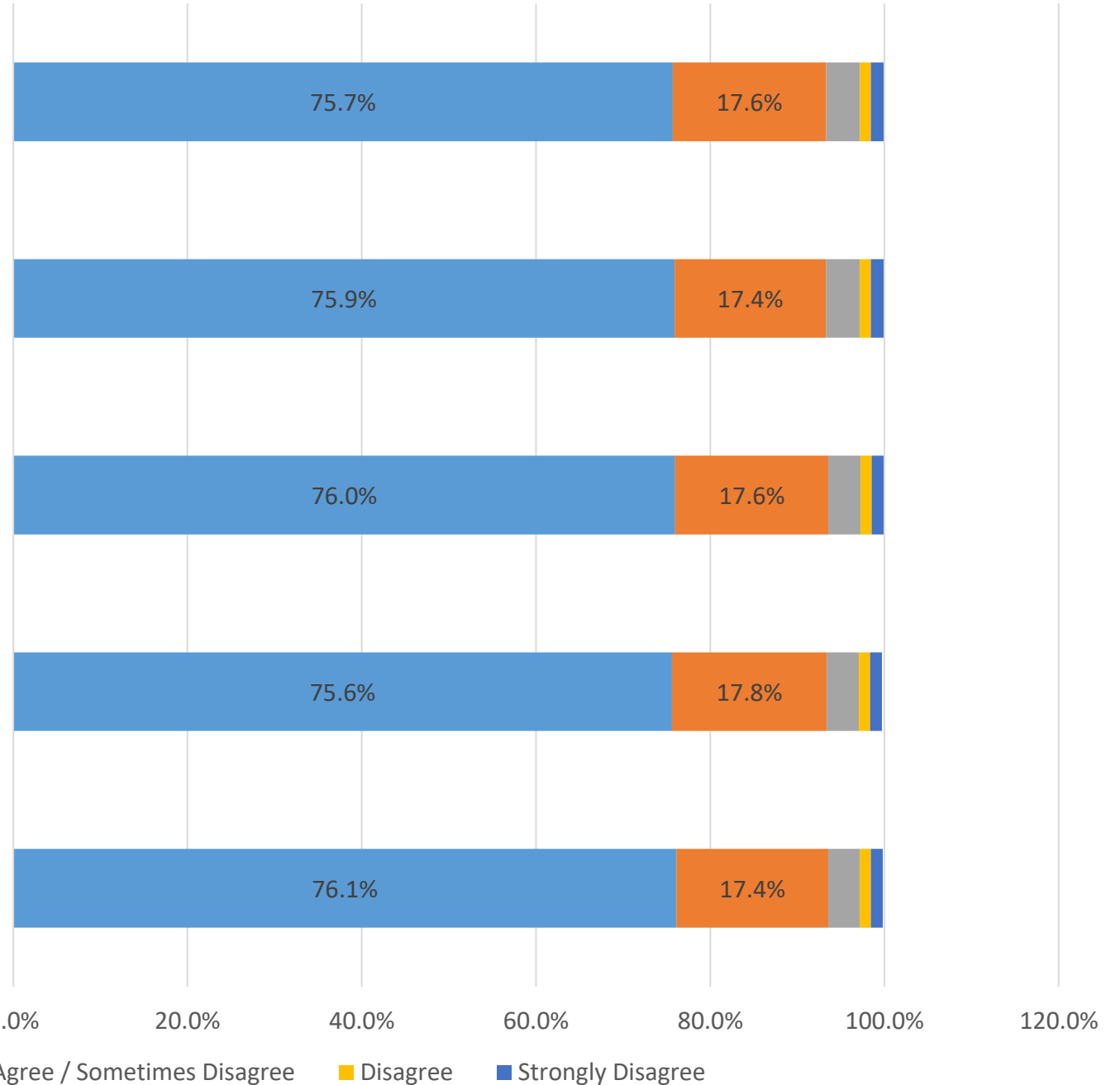
0.0% 20.0% 40.0% 60.0% 80.0% 100.0% 120.0%

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.



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

My financial advisor...

Ensures accuracy in all our work.

75.9%

17.5%

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

76.3%

17.1%

Delivers against his/her commitments.

75.8%

17.6%

Is recognizably better than his/her competitors.

76.3%

17.3%



0.0% 20.0% 40.0% 60.0% 80.0% 100.0% 120.0%