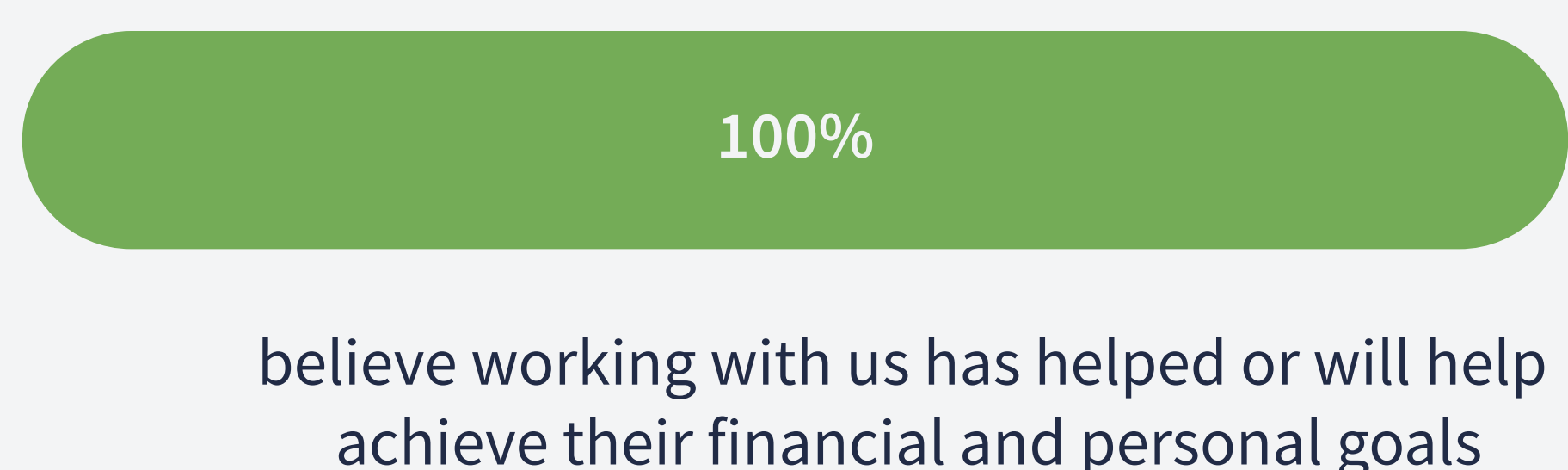
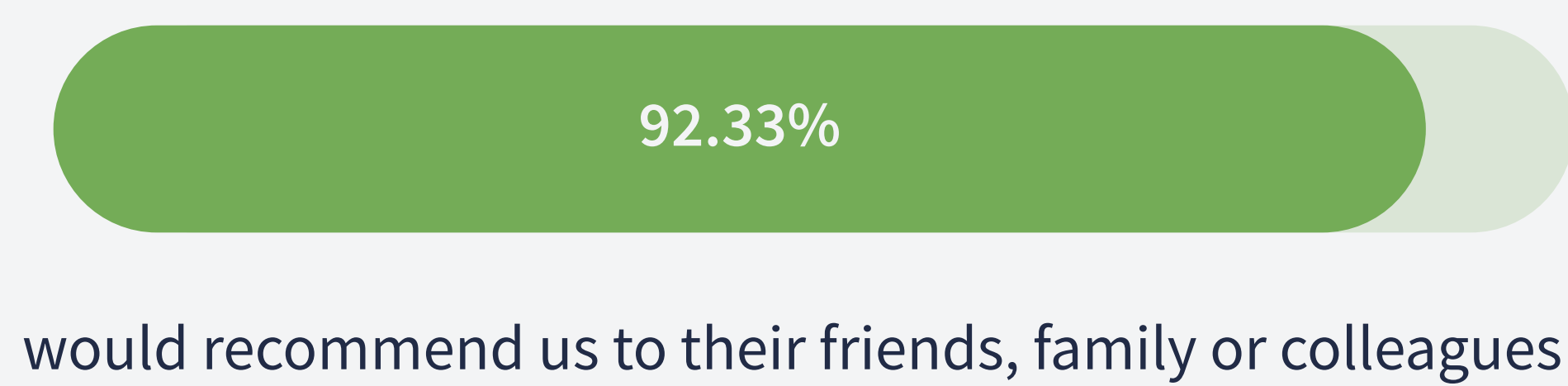
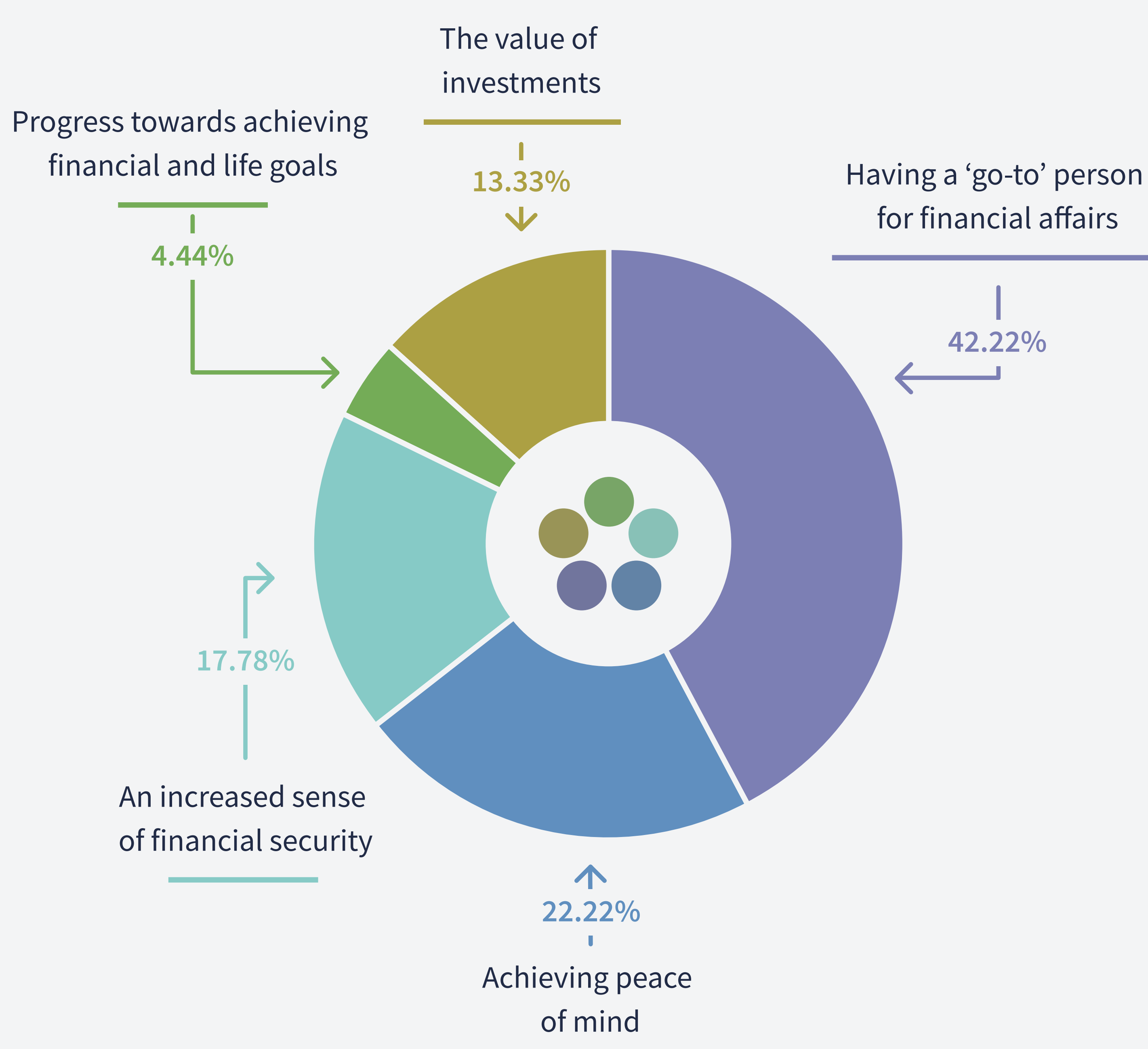


We carried out a client survey in 2023 to find out what our clients thought of us and the service we provide. Here's what they had to say:



HOW DO YOU MEASURE THE VALUE YOU RECEIVE FROM YOUR PLANNER?



HOW SATISFIED ARE YOU WITH OUR PERFORMANCE IN THE FOLLOWING AREAS?

● very satisfied ● mostly satisfied

Speed of response from your adviser:



Speed of response from the support team:



Understanding your needs and goals:



Communication between meetings:



Annual refine meetings:



WHAT ARE YOUR THREE BIGGEST FINANCIAL CONCERNS?

Those who have not yet retired:

- Not having enough money to live my preferred lifestyle in retirement
- My family's financial security should anything happen to me
- Not having enough money to retire at my preferred retirement age

Those who have already retired:

- Not having enough money to continue living my preferred lifestyle in retirement
- The cost of care in old age
- Potential investment losses

WHAT IS THE SINGLE BIGGEST BENEFIT YOU GET FROM WORKING WITH US?

“Peace of mind.”

“Reassurance that my money is safe.”

“Support and clear explanations when making difficult financial decisions.”

“You look after our finances, which takes the stress off me.”

“Always very approachable, and I have complete trust and confidence in your team's management of my financial affairs.”

“Personal relationship and peace of mind.”

GET IN TOUCH

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