



We asked you: How do you rate the quality of advice you receive? **You said 9.34 / 10**

We asked you: How do you rate the level of service you receive? **You said 9.66 / 10**

WOW! What an overwhelming response. Thank you all so very much, it's certainly heart-warming to hear that you are so happy with the advice and service you receive from us.

We have read all of the responses and here is a summary of what you have said:

What are we doing best?

Regular contact, newsletters, straight forward language, access to advisers when needed, advisers understand your needs, we give you peace of mind, we are honest and caring, our staff are friendly and welcoming, great communication, prompt response to concerns, trustworthy and competent, personal touch yet professional, portfolio growth, liaison with 3rd parties, minimal paperwork, patience and understanding, thorough research.

What can we work on?

An additional talk during the year, open another office, budget guide, better investments, ethical investments, quarterly/monthly update on investment performance.

For those who have provided the wonderful feedback on things you would like to see us improve we will be in touch with you shortly.

The winners of the double passes to the movies are:

Agnes H.

Kim & Greg L.

Lois V.

Josephine K.

Lyndel H.

Your tickets have been posted out and you should receive them over the next few days.

