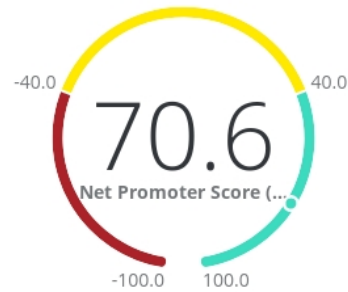
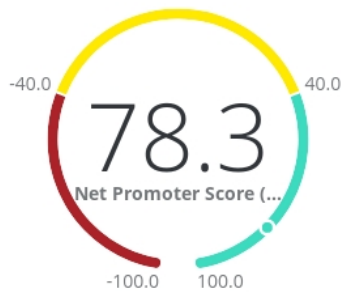


Net Promoter Score (NPS) measures client satisfaction overall. I come out ahead of other firms nationally! "Your Firm" are "your" (my client's) answers; "All Firms" are combined national responses. My Firm: 46 of 70 families participated anonymously. 16,672 participated nationally.

Your Firm: NPS Score ⓘ 46 Responses

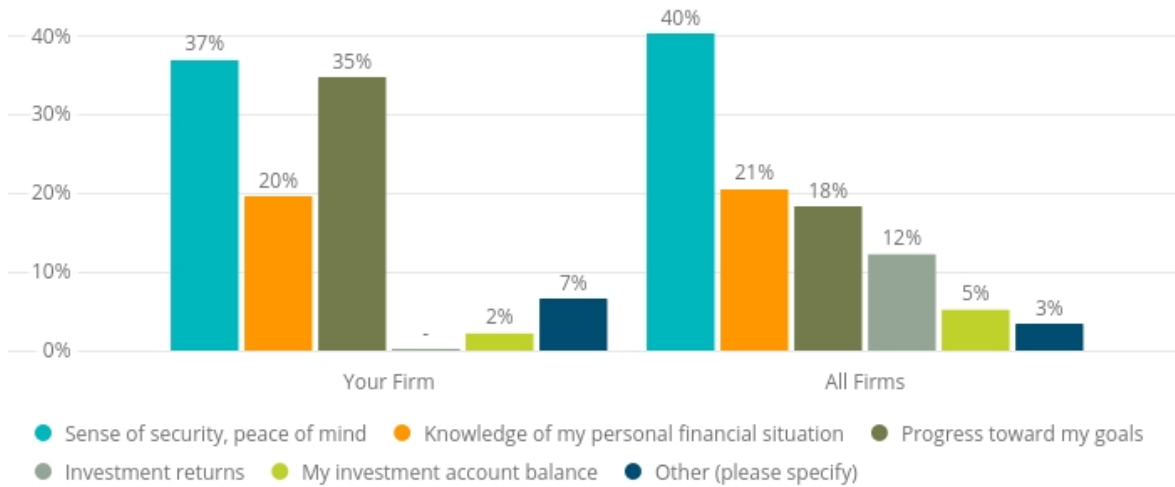
All Firms: NPS Score ⓘ 16,672 Responses

▼ 2



My clients value "Sense of security, peace of mind," "Progress towards goals," and "Knowledge of situation."

How do you primarily measure the value received from your advisor? 16,672 Responses



Other Responses: How do you primarily measure the value received from your advisor? 3 Responses

▼ 1

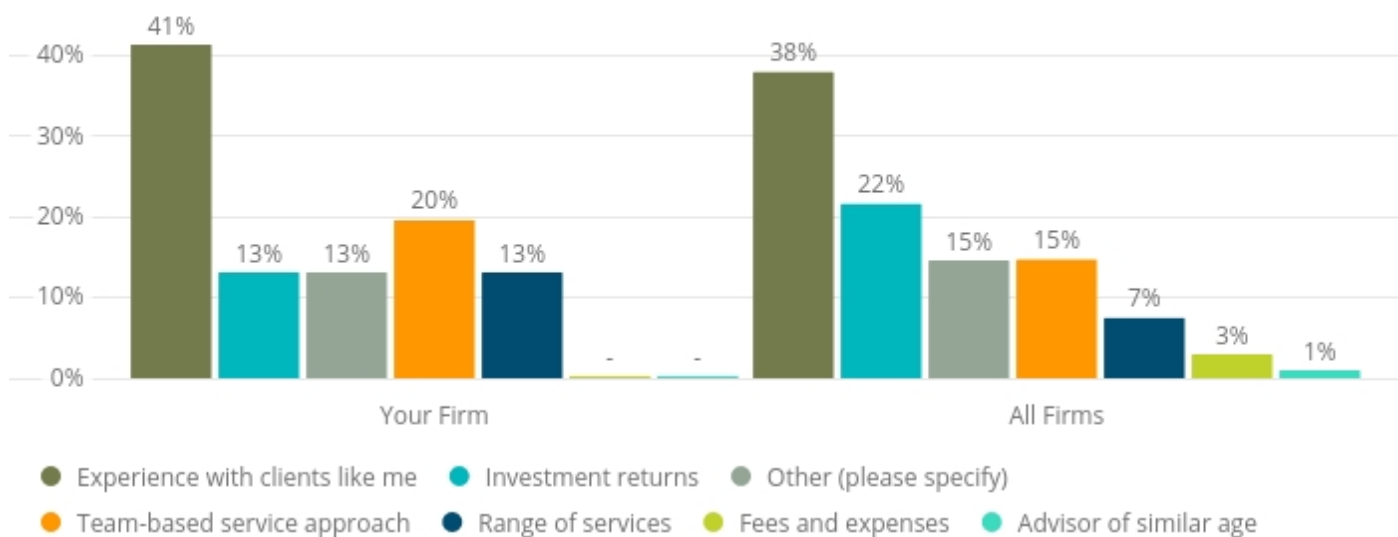
How much I trust that person and why

All the above - Investment balance

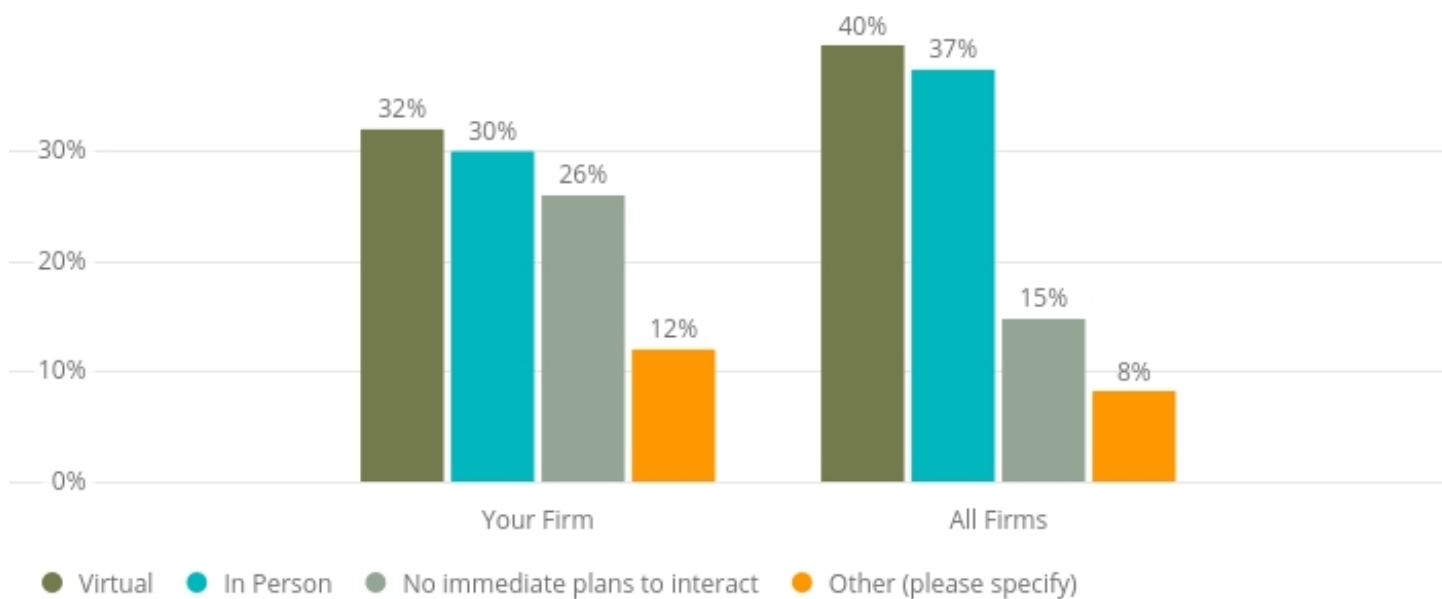
all of the above

What attribute do you consider most important in your advisor relationship? 16,672

Responses

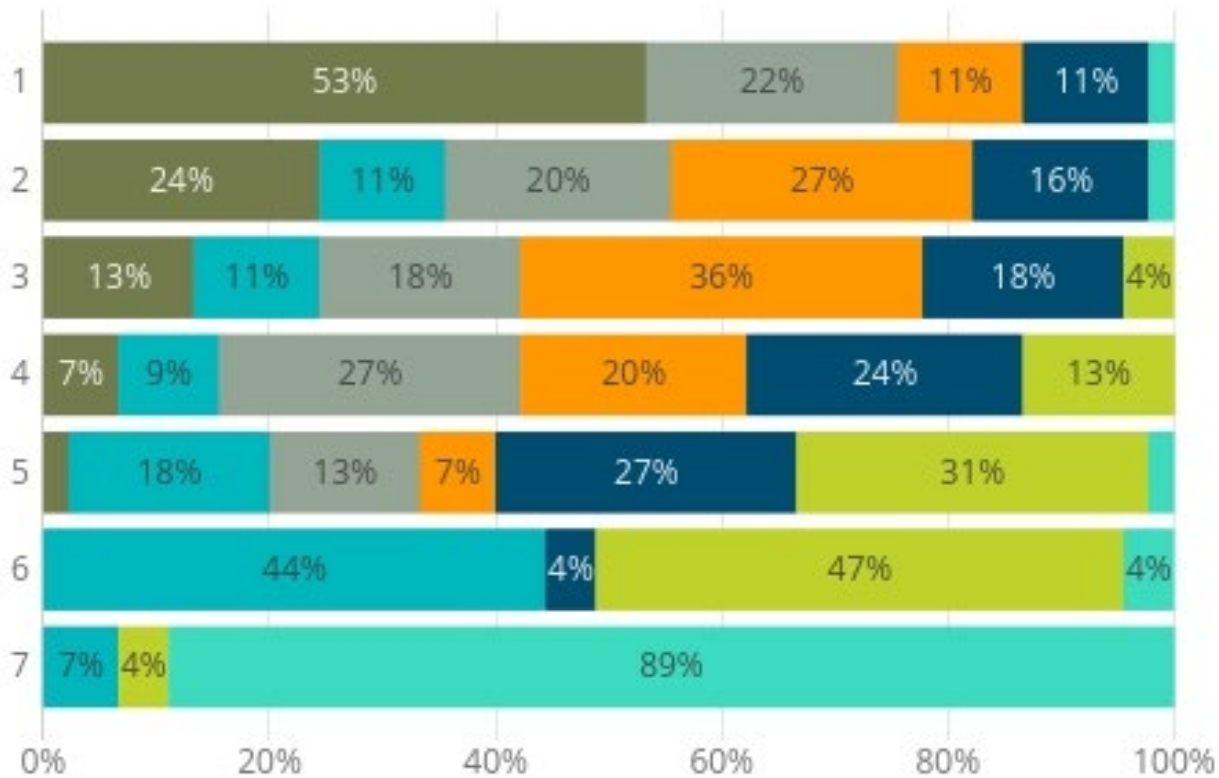


How would you prefer to interact with your advisor in the near future? 11,870 Responses



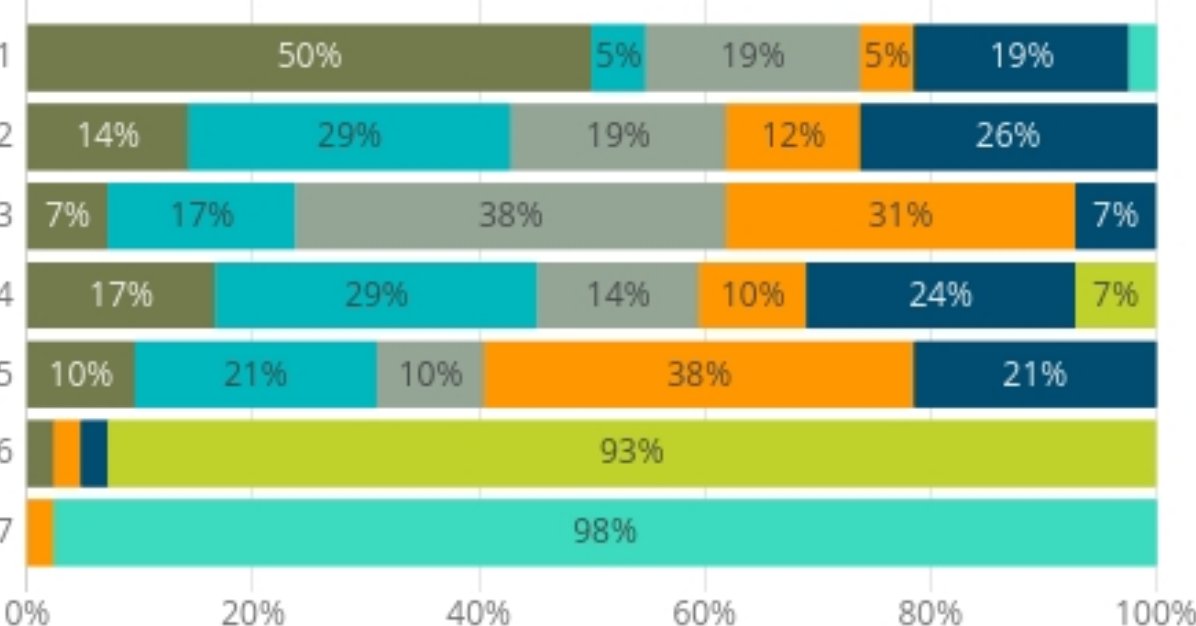
Your Firm: What is your greatest fear about your personal finances? (Rank order with #1 being your greatest fear) 45 Responses

Responses



- Not having enough money to live comfortably in retir...
- Experiencing a significant investment loss in a mark...
- Incurring unforeseen expenses (e.g., medical)
- Passing along assets to heirs who will not use them ...
- Other (please specify)
- Losing my job
- Outliving my money

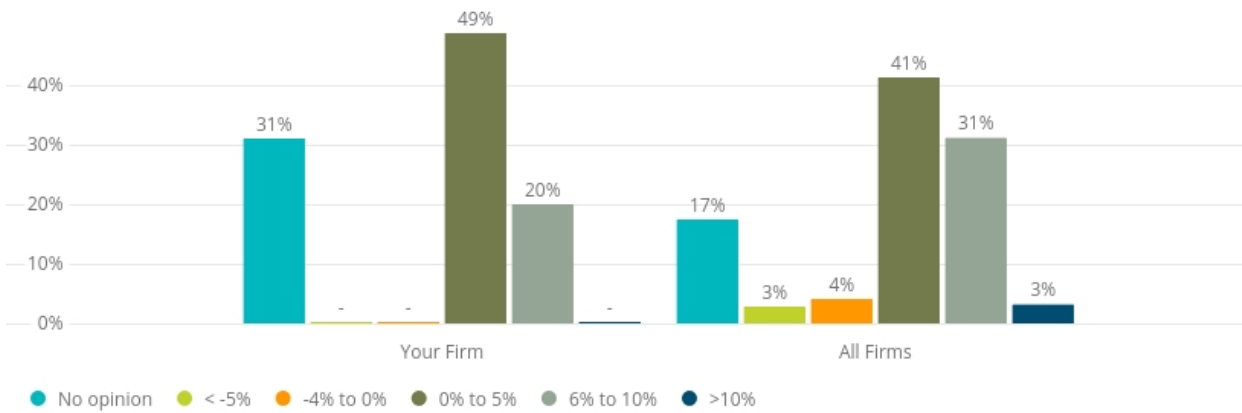
Your Firm: What gives you the greatest comfort about your personal finances? (Rank order with #1 being your greatest comfort) 42 Responses



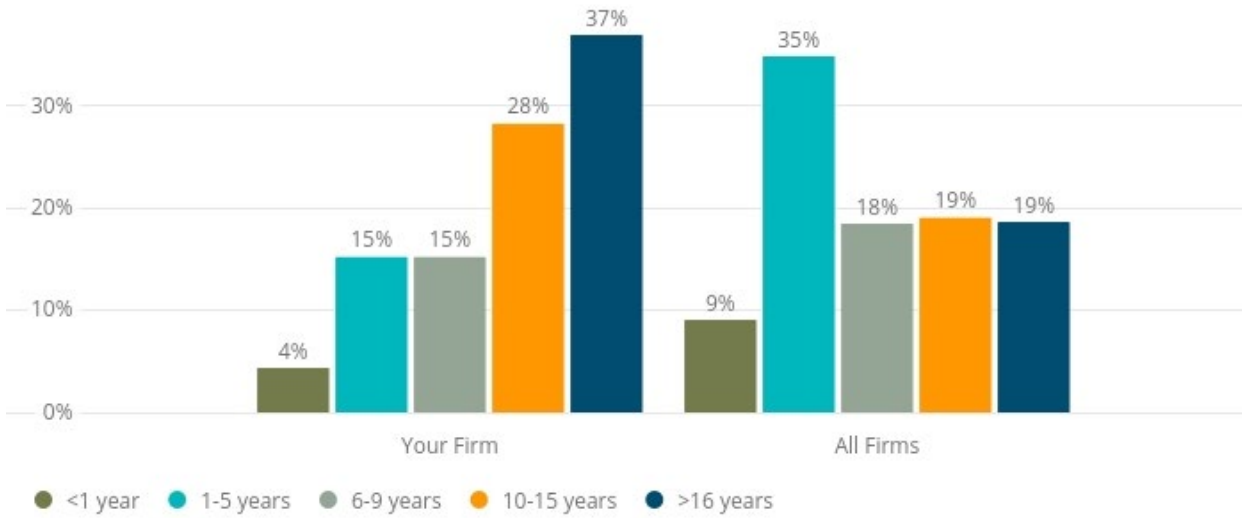
- Having enough money to live comfortably in retirement
- Knowing I'm prepared for unforeseen expenses
- Knowing my advisor is regularly monitoring my invest...
- Understanding where I am relative to my financial goals
- Knowing my advisor acts in my best interest
- Passing along assets to heirs who will use them wisely
- Other (please specify)

What is your current expectation of annual returns for the stock market over the next 12 months? 3,334

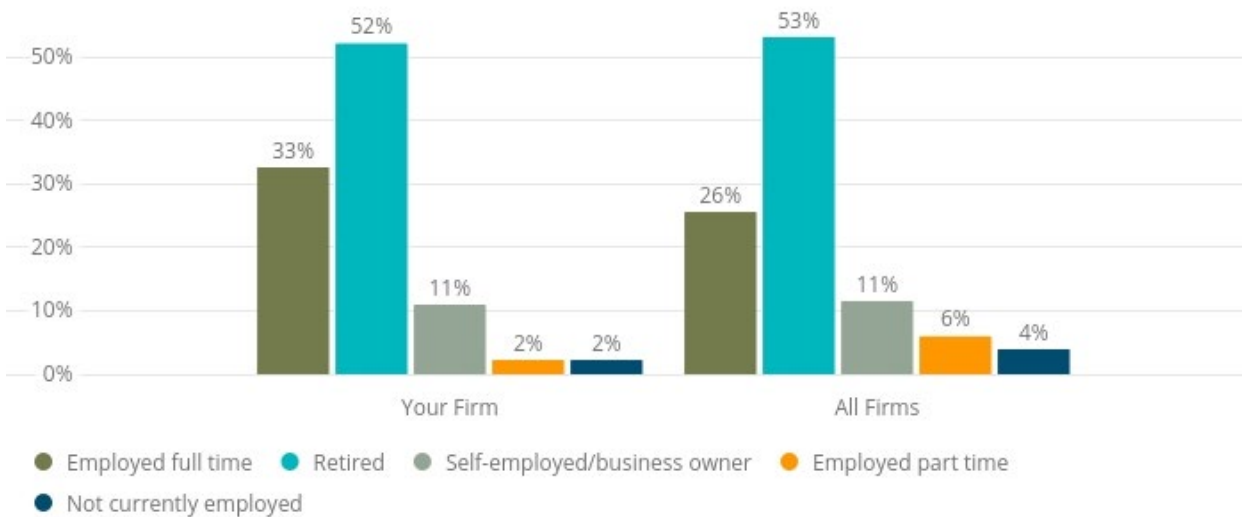
Responses



Years with Advisor 16,587 Responses



Employment Status 16,573 Responses

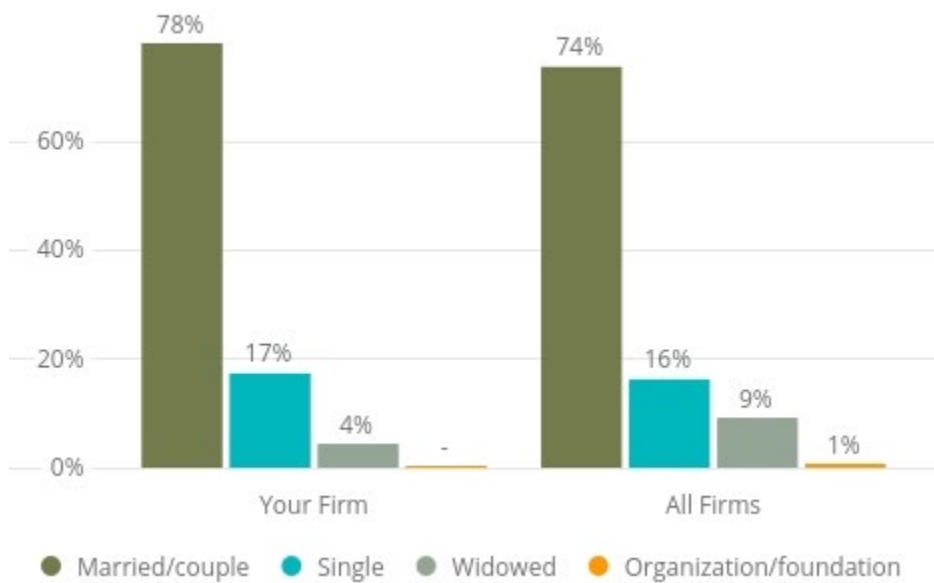


This confirms my goal to work with “normal” people, and not focus on those who have the most money. Progress towards your goals (as seen above) is more important to me than your money.

Total Investable Assets 16,398 Responses

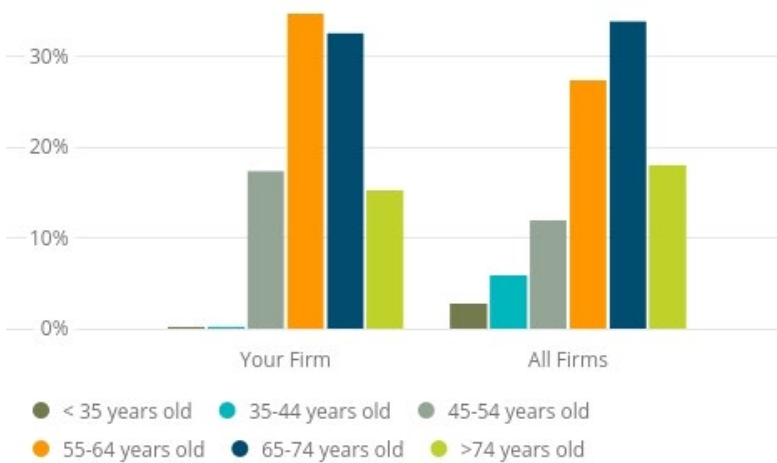


Client Type 16,711 Responses



Age 16,621 Responses

▼ 1



My clients are very similar to the national results across the board in the below areas:

Rank your primary financial concerns during the COVID-19 pandemic (On a scale of 1-8 with, 8 being your primary concern): 9,474 Responses

