

Summary of Feedback 2014-15

Summary

Staff Feedback Section

Overall staff rating



Satisfied	13	100%
Neutral	0	0%
Dissatisfied	0	0%
	0	0%

Courtesy of Staff



Satisfied	13	100%
Neutral	0	0%
Dissatisfied	0	0%
	0	0%

Knowledge of Staff

Summary of Feedback 2014-15



Satisfied	13	100%
Neutral	0	0%
Dissatisfied	0	0%
	0	0%

Timeliness of Follow Up calls



Satisfied	13	100%
Neutral	0	0%
Dissatisfied	0	0%
	0	0%

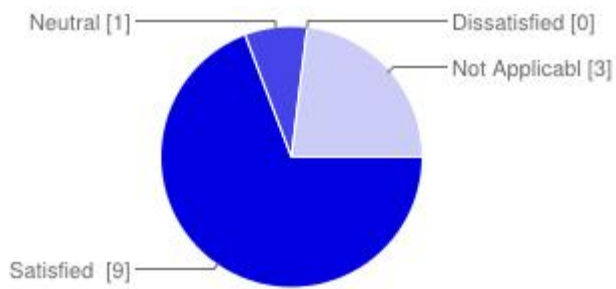
Promptness in answering phone calls



Satisfied	13	100%
Neutral	0	0%
Dissatisfied	0	0%

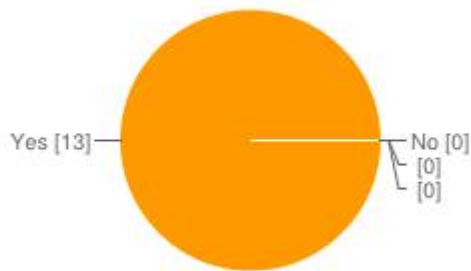
Summary of Feedback 2014-15

Setting up of Accounts and Follow up on Account Transfer from old investments



Satisfied	9	69%
Neutral	1	8%
Dissatisfied	0	0%
Not Applicable	3	23%

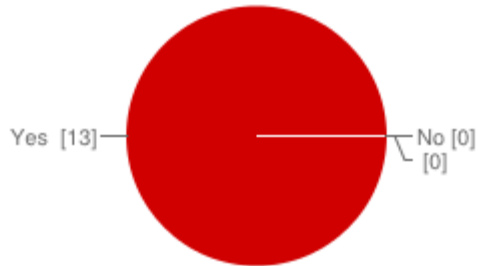
Have recommendations made by the Planner followed up by the staff accurately and on a timely basis?



Yes	13	100%
No	0	0%
	0	0%
	0	0%

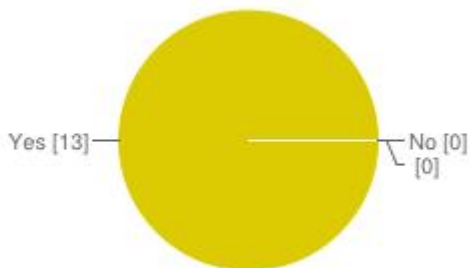
Certified Financial Planner feedback section

My advisor gives advice that is in my best interest



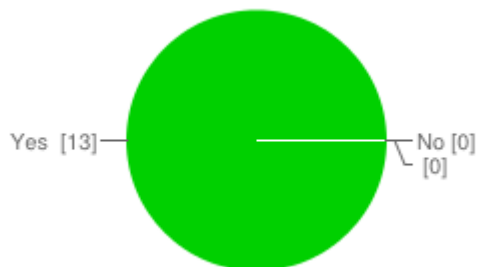
Yes **13** 100%
No **0** 0%
0 0%

Investment Strategies fit your goals.



Yes **13** 100%
No **0** 0%
0 0%

My advisor continually looks for better ways to Service the client.

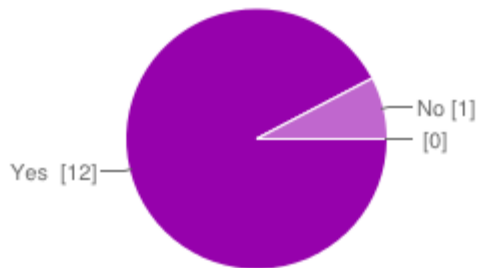


Yes **13** 100%
No **0** 0%

Summary of Feedback 2014-15

0 0%

My Advisor reminds me of my investment goals, when recommending investment options.

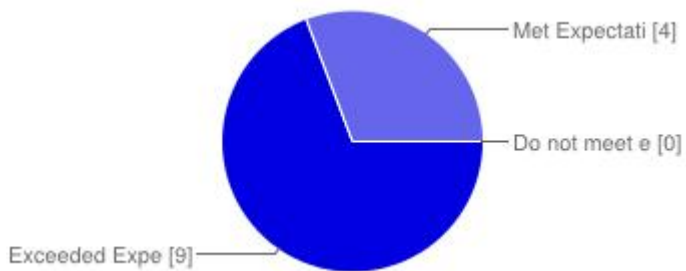


Yes 12 92%

No 1 8%

0 0%

Overall how would you rate us.



Exceeded Expectations 9 69%

Met Expectations 4 31%

Do not meet expectations 0 0%