

## Client Satisfaction Survey Results

June 2009

### Notes

1. Anonymous survey of all Clients in May 2009. 47% response rate, 98% 'excellent' or 'good.'
2. No rewards or incentives were offered to those who returned survey forms.
3. The table below shows the detailed responses on each measure.

	<i>Excellent</i>	<i>Good</i>	<i>Average</i>	<i>Try Harder</i>	<i>Good or Excellent</i>
<b>1. Client Service</b>					
Speed that the phone is answered	65%	35%	0%	0%	<b>100%</b>
Manner in which phone is answered	74%	26%	0%	0%	<b>100%</b>
Speed of answers to queries	50%	50%	0%	0%	<b>100%</b>
Accuracy of answers to queries	63%	37%	0%	0%	<b>100%</b>
Hospitality when you visit	87%	13%	0%	0%	<b>100%</b>
Timeliness of transaction processing	65%	32%	3%	0%	<b>97%</b>
Accuracy of transaction processing	71%	29%	0%	0%	<b>100%</b>
Speed in which problems are solved	55%	45%	0%	0%	<b>100%</b>
Follow-up of outstanding issues	57%	43%	0%	0%	<b>100%</b>
Overall Competence & Professionalism	81%	19%	0%	0%	<b>100%</b>
<b>2. Personal Contact</b>					
Ease of communications	71%	29%	0%	0%	<b>100%</b>
Frequency of contact	45%	52%	3%	0%	<b>97%</b>
Availability of your adviser	70%	30%	0%	0%	<b>100%</b>
Overall quality of adviser contact	75%	25%	0%	0%	<b>100%</b>
<b>3. Formal Communication</b>					
Quality of letters / emails	56%	44%	0%	0%	<b>100%</b>
Frequency of letters / emails	47%	47%	6%	0%	<b>94%</b>
Ease of understanding letters / emails	41%	53%	6%	0%	<b>94%</b>
Value of letters / emails	39%	61%	0%	0%	<b>100%</b>
Quality of newsletters and updates	50%	50%	0%	0%	<b>100%</b>
Frequency of newsletters and updates	39%	52%	10%	0%	<b>90%</b>
Value of newsletters and updates	34%	63%	3%	0%	<b>97%</b>
Quality of regular reports	42%	58%	0%	0%	<b>100%</b>
Ease of understanding reports	39%	45%	16%	0%	<b>84%</b>
Value of reports	39%	61%	0%	0%	<b>100%</b>
<b>4. Quality of Service</b>					
Financial management advice	56%	44%	0%	0%	<b>100%</b>
Insurance advice	56%	44%	0%	0%	<b>100%</b>
Advice on KiwiSaver and other savings	65%	35%	0%	0%	<b>100%</b>
Investment advice	54%	46%	0%	0%	<b>100%</b>
Estate planning advice	38%	62%	0%	0%	<b>100%</b>
Overall value of service	63%	37%	0%	0%	<b>100%</b>
<b>5. Investment Issues</b>					
Market conditions have been explained well	73%	24%	3%	0%	<b>97%</b>
Expectations are being met	55%	31%	10%	3%	<b>86%</b>
I am getting overall value for money	48%	38%	10%	3%	<b>86%</b>
<b>6. Other</b>					
Would you recommend us to a friend?				<b>No</b>	<b>Yes</b>
				0%	<b>100%</b>