Client Survey Results 2010

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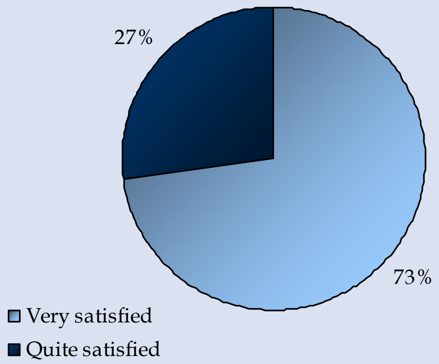
2010 Client Survey Results

In October 2010 we carried out research with our existing clients who were invited to fill in an online survey, which covered five key sections. These key sections included their overall satisfaction, their experience of the service we provide, current concerns and information requirements, communication preferences and any observations.

We were overwhelmed with the responses, especially with how positively our clients responded. We therefore thought it worthwhile to share the results with you all.

Overall Satisfaction

30 clients responded to our survey, of which 100% rated their overall satisfaction as very satisfied or quite satisfied. We were very pleased to have achieved an average satisfaction score of **4.7** on a scale of 1-5, with 5 being 'very satisfied'.



"I have done more with you both in the last year or so and I think you have, if anything, become even more professional at what you do."

The Experience of the Service we Provide

We moved to our Cheam office in July. At the same time, we refreshed our Practice brand identity and took on two new staff members, Hayley and Ben.

Given that such significant changes had taken place in the summer, we were pleased to see positive feedback on our practice during this same period.

It is important to us that our team is constant in its service quality and continuously reflects our approach to good client service and professional advice.

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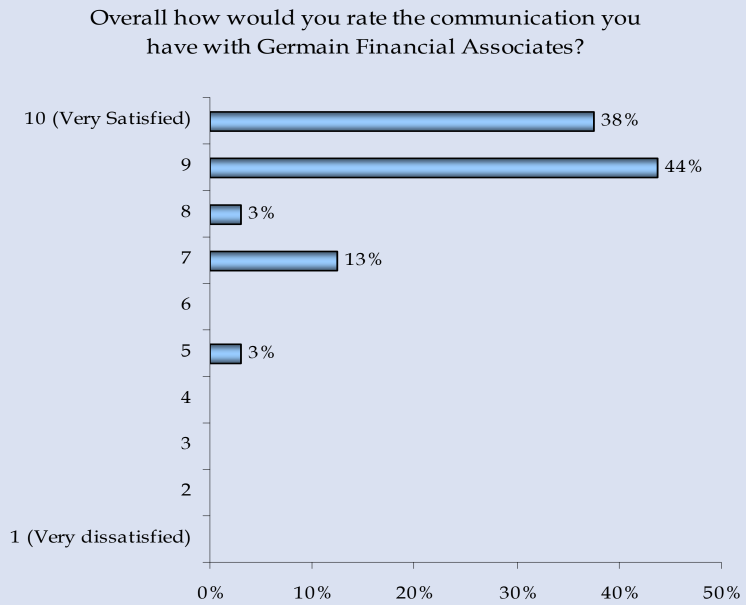
43% of the clients who completed the survey also asked for more regular valuations. Whilst we will continue to provide these at our Service Review Meetings, we are arranging for more frequent Wealth Accounts to be sent directly to clients. This is currently being implemented.

Our Monday Market Bulletin has been well received. Over the recent months, we have introduced a few features which we believe have improved the Market Bulletin. You are now able to forward the email to a friend or colleague, allowing them to subscribe for their own copy. The email now also carries an 'unsubscribe' button.

Communication



We were overwhelmed by the fact that half of the clients who completed the survey like the Meeting Reminders feature.

We shall continue to send out our confirmation of appointment letters with agendas.

In addition, Hayley will call, email or text a couple of days ahead of the meeting as a reminder.

It is also great to see how many of our clients want frequent meetings (more than annually) as we strongly believe in good client service and regular contact.

Advocacy

All of our clients who completed the survey said that they would recommend us to others. We are really pleased with this as 100% of our business in 2010 came solely from existing clients and referrals. By being in this position, we have been able to spend more time on the structuring of client advice and increasing our service and communications to all our clients.

We'd like to say THANK YOU to all our clients. We do enjoy seeing friends, family and colleagues of our existing clients - it makes our job even more enjoyable.

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Your Comments

"I have been very impressed with the service, advice and communication I receive from Germain Financial Associates. I have recommended them to friends and colleagues and know that they have extended the very same, high level of service to my contacts."

"Both Michelle and Steve Germain are very approachable and professional people and easy to talk to and work with. Germain Financial Associates look after our work pension, so I spoke to Michelle about looking into my mortgage when it came up for renewal. Michelle found me an excellent mortgage based on how much I could pay and got a great rate of interest on it. Following this, Michelle also set up a 'university fund' for my daughter, which was another thing on my to do list crossed off. She also sort out some excellent health cover with BUPA and I now feel very secure that my finances and insurances are in the correct place and working for me and I have the proper amount of cover should anything ever happen to me, be it redundancy, health issues, death etc... to protect my family. Michelle is also very good at explaining all the legal jargon so you actually understand what you are taking out. Thank you to Michelle for helping me with this in what was a very painless process!"

"It is always a pleasure dealing with Michelle and the team. Her personal style is open and approachable and is underpinned by an in-depth knowledge of the type of financial areas and dealings that are of direct relevance to me!

"I am extremely happy with the service, the communication and the team. Keep up the good work"

"I have only just become a client of Germain Financial Associates but have been very impressed by the service Michelle has provided to me thus far in all respects - timely, professional, accurate, good follow up, not pushy (very important to me), etc. I trust that will all continue in to the future."

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About Germain Financial Associates

Germain Financial Associates is a family based firm of financial advisors, providing tax and regulatory advice, investments, financial services and support.

We satisfy a need by individuals, business owners and entrepreneurs for trusted, insightful and proactive financial advisors, who are specialists in certain markets, experts in their fields, and who continuously add value through their support and advice.

Together, Steve and Michelle have over 35 years of experience advising across a comprehensive range of financial topics.
They have access to a portfolio of tools and specific methodologies which are all tried and tested and which help to bring clarity to finance.

Above all, as a company we provide re-assurance & direction, knowledge & expertise.

We are attentive, supportive and reliable and seek to forge enduring long-term relationships whilst increasing your personal wealth. In all this, we never lose sight of budgets, timings and personal relationships.

Take control of your financial future.

Your first step is to contact us to arrange your complimentary, no obligation meeting.

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