

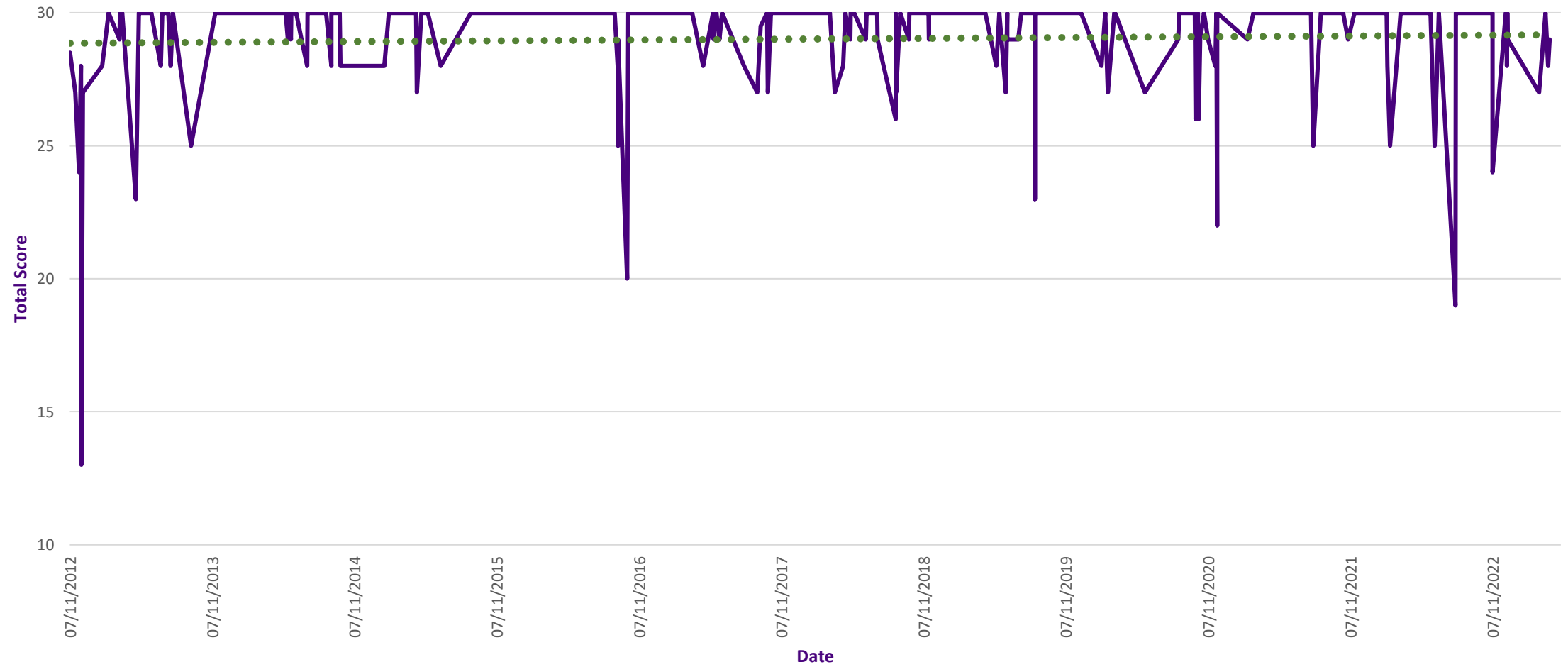
# Clearwater Client Feedback Forms

Analysis of client feedback November 2012 – November 2023

# Total Points Per Feedback Form



WEALTH MANAGEMENT LLP  
CHARTERED FINANCIAL PLANNERS

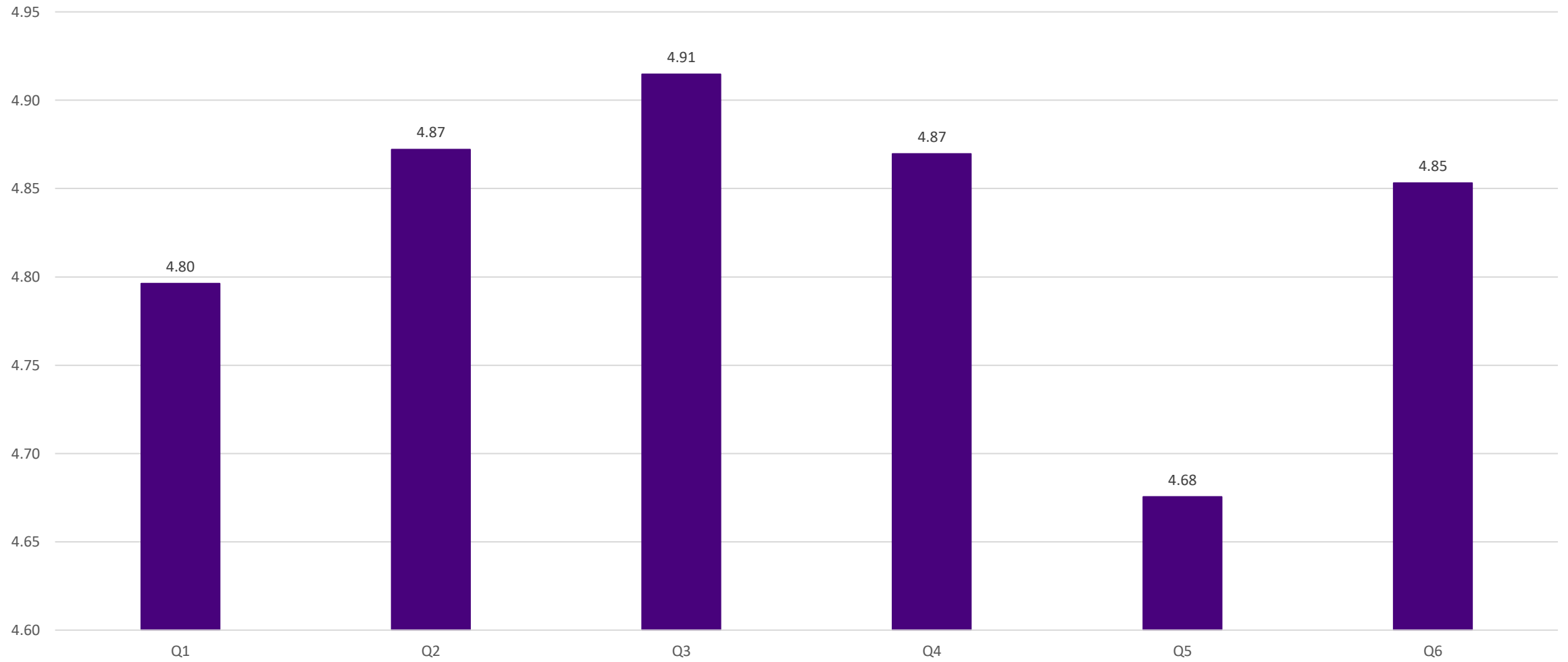


# Total Points Per Feedback Form - Analysis

Since November 2012:

- A total of 211 forms have been returned
- 66% of our clients awarded us maximum points demonstrating excellent customer satisfaction - 100% satisfaction
- 92% of our clients awarded us 27 or more points - 90% satisfaction
- Only 8 customers awarded us less than 27 points
- Only 1 customer awarded us less than half the available points
- The dotted green line in the previous slide shows us an upward trend overtime

# Average Points Per Question



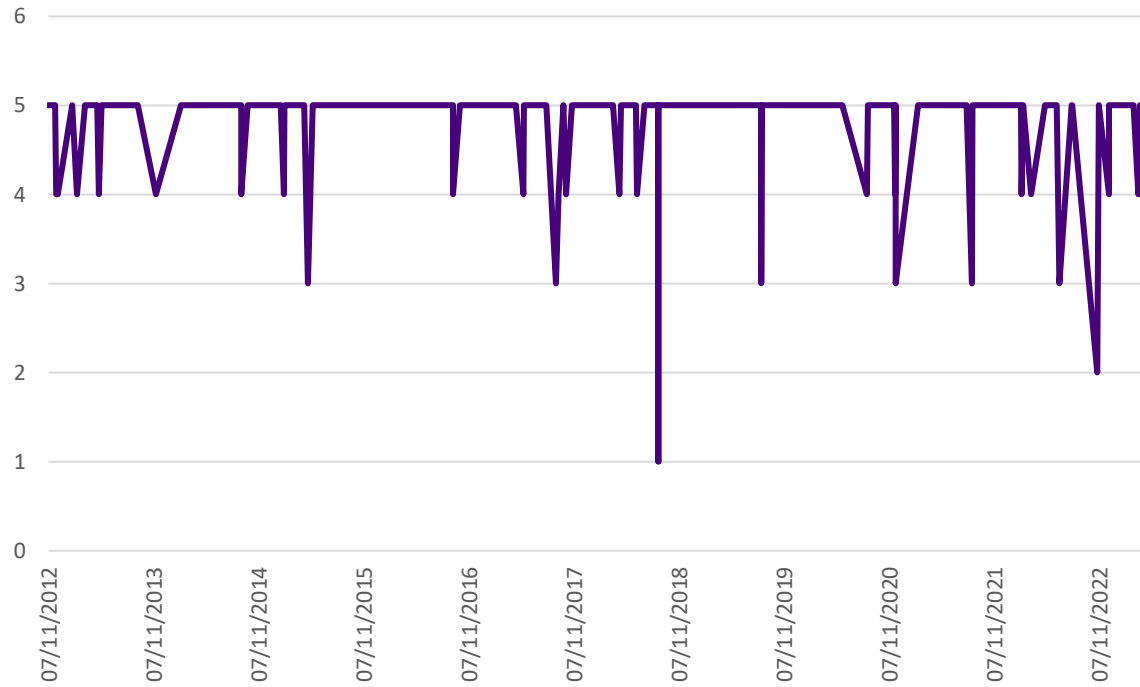
# Average Points Per Question - Analysis

Since November 2012:

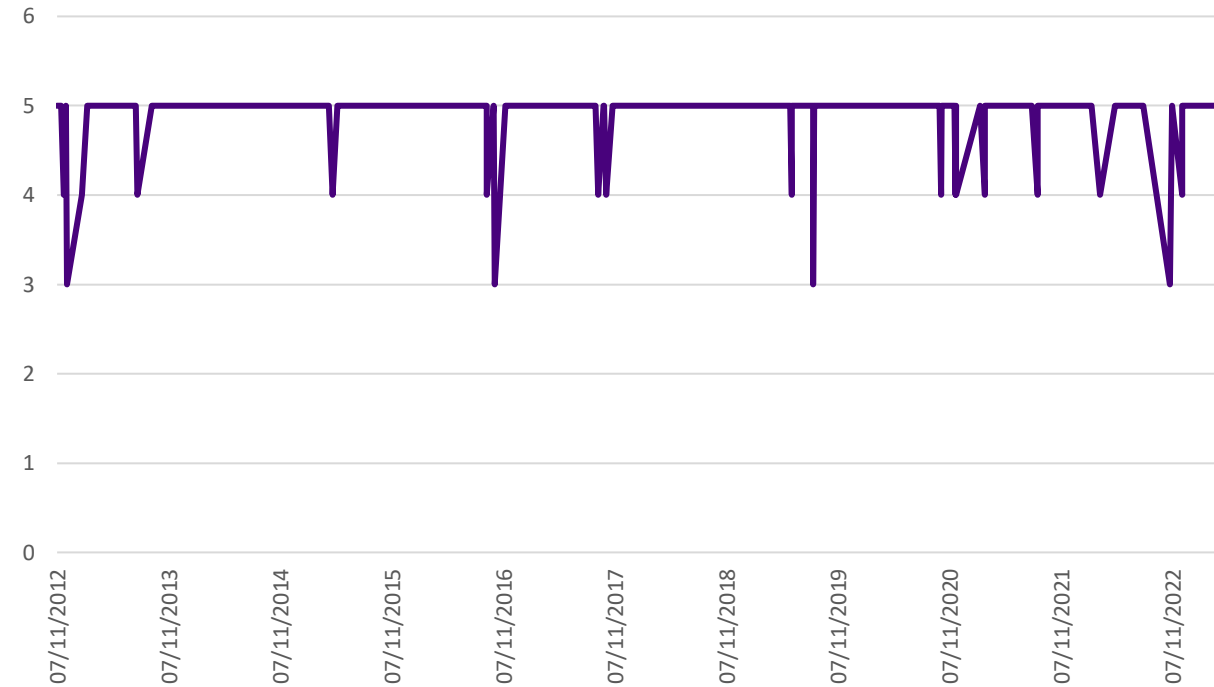
- The first 3 questions have a combined average of 4.86 out of 5
- The most successful is question 3 – ‘To what extent do you feel Clearwater demonstrate an understanding of you personal circumstances and goals/objectives.
- This demonstrates that we know our clients and their needs
- The weakest question, but still averaging 4.68 out of 5, is question 5 – ‘To what extent do you feel the Clearwater service continues to provide good value for money?’

# Trends Per Question

Question 1

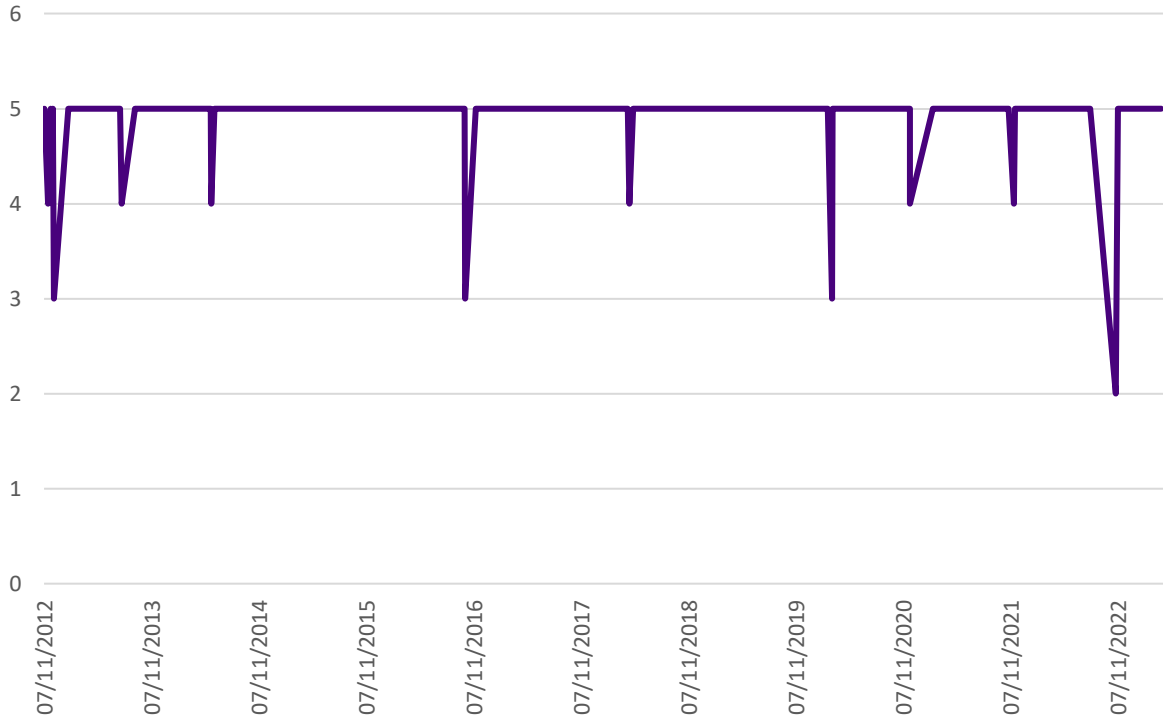


Question 2

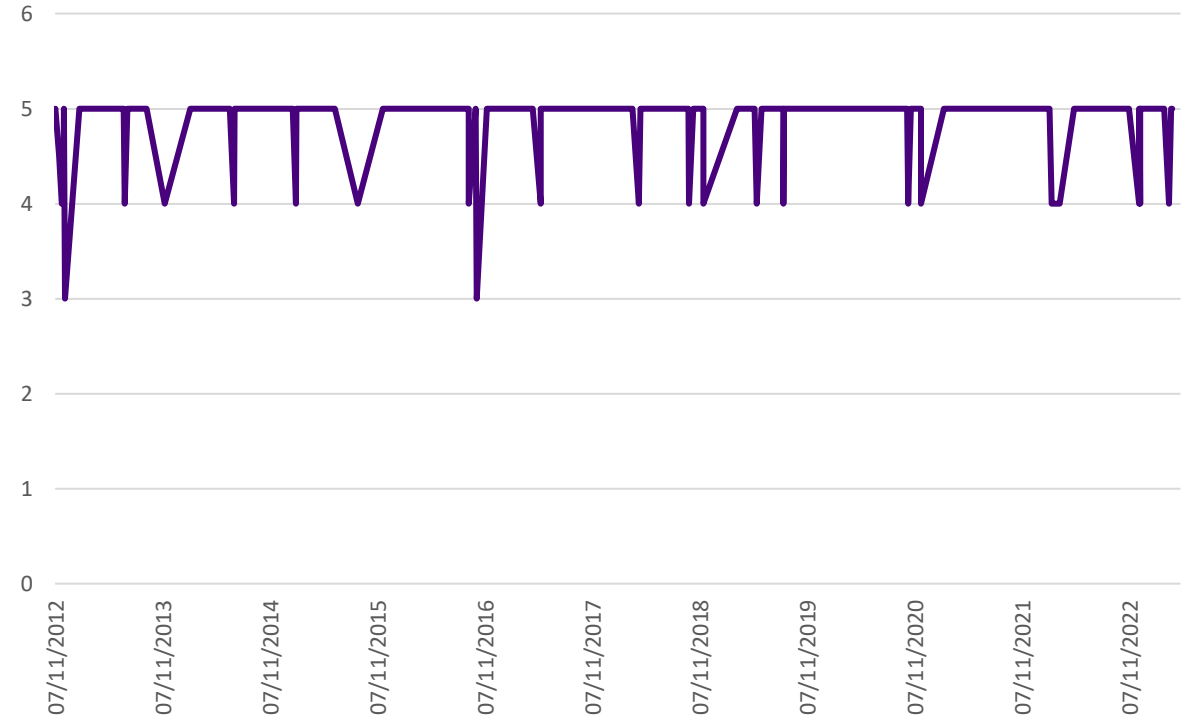


# Trends Per Question (cont.)

### Question 3

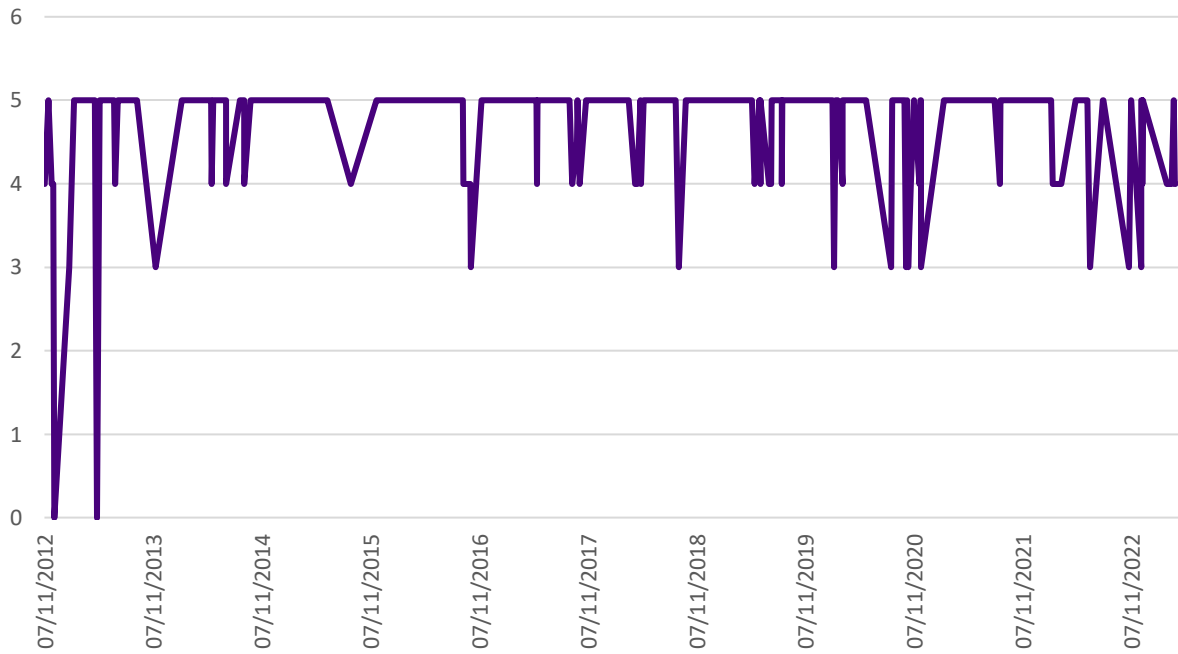


### Question 4

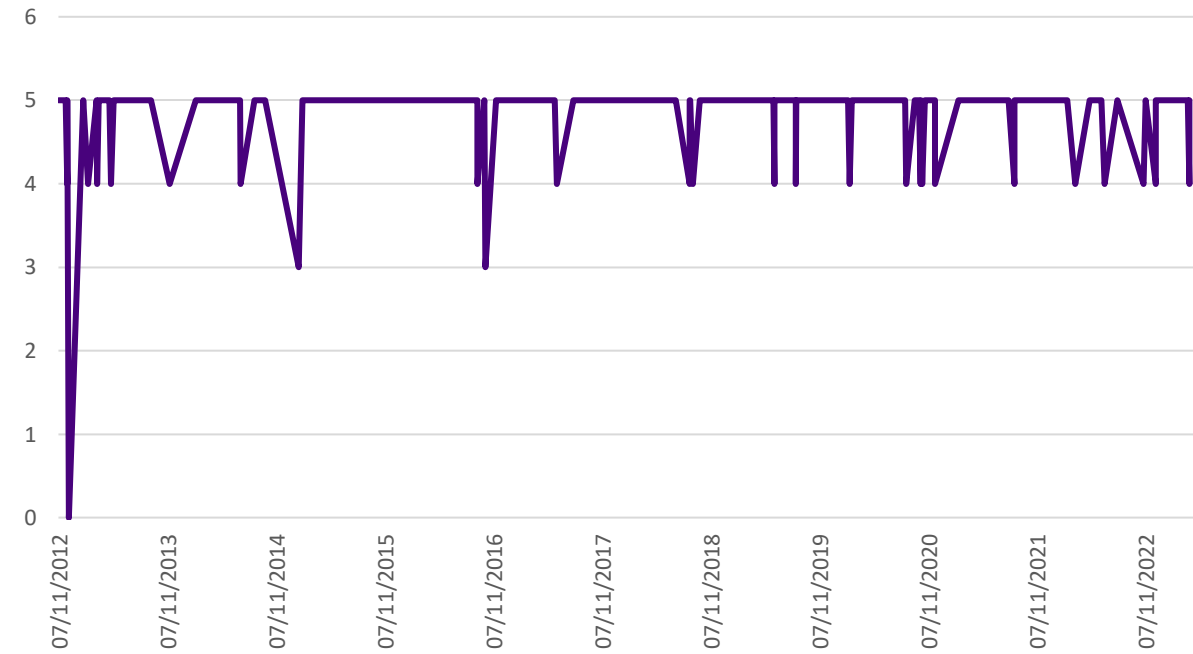


# Trends Per Question (cont.)

### Question 5



### Question 6





# Trends Per Client – Analysis

We have analysed the data and have found that since November 2012:

- 35 clients have awarded maximum points on every survey
- 7 client scores have significantly increased over time
- Only 7 clients scores have reduced over time
- Of these, only 4 clients have reduced their scores by more than 1 point. We have discussed these results with each to gain valuable feedback

# Appendix



## Clearwater Client Feedback Form