

Client Experience Research

Prepared for Acqira Wealth Partners

August 2016

1. BACKGROUND & METHODOLOGY

Client Experience Research

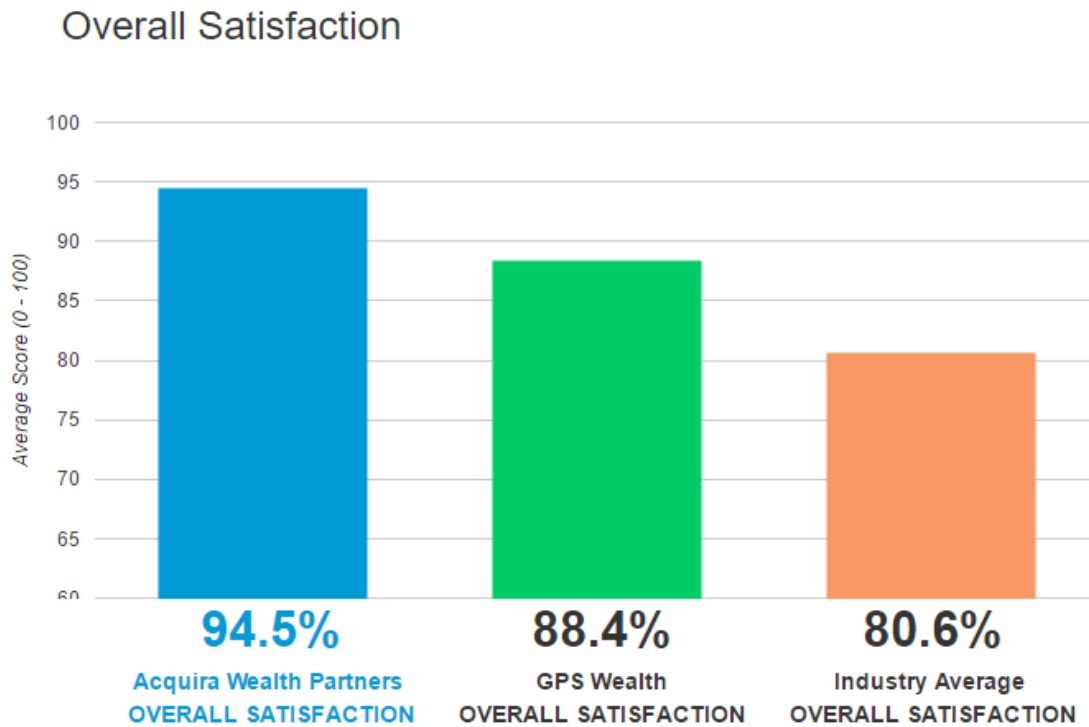
This report presents the findings from the Client Experience Research conducted by CoreData from 27th July to 14th August 2016.

The research was conducted via an online survey of approximately 17 questions, hosted and managed by CoreData. Details of clients surveyed and response rates are set out below:

Firstly, I would like to thank everyone that was able to take part in the Client Experience Research. We are grateful for your time and responses and this will help to shape and grow our practice to ensure we continue to be the leading financial planning business on the Gold Coast.

What is most pleasing to us was the difference between the **Industry Average** and the results the **Acqira Wealth Partners** received.

A great place to start is with the Overall Satisfaction and this was significantly better the both GPS and the industry and we found that this trend continues throughout the results.



The next section of results confirmed that the number one reason we are doing such a great job is that we deliver **value** and this has led to a very high commitment from you to continue to work with us and to also introduce people to us that you think may also benefit from a business that



Loyalty

	Your Score	GPS Wealth Average	Industry Average
Intention to Refer	94.8	86.7	73.6
Intention for ongoing relationship	93.9	86.5	78.3
ROLLUP Score	94.3	86.6	76

Satisfaction and Loyalty Drivers

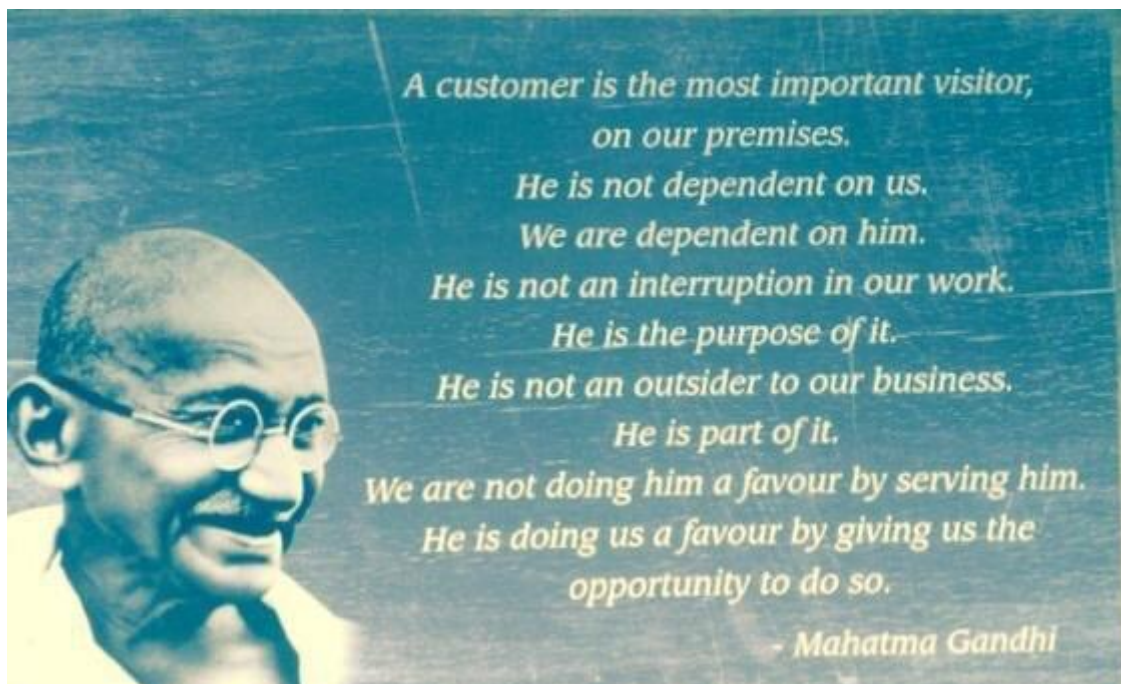
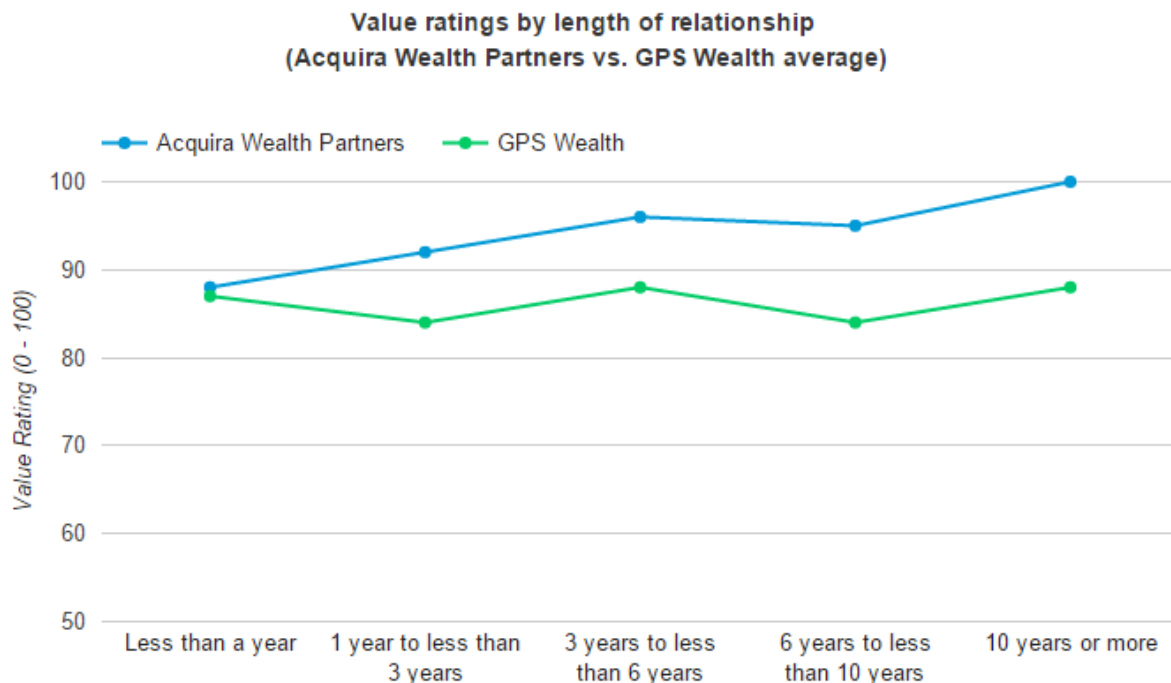


It is also pleasing to know that we have been able to deliver value and provide client satisfaction over the long term – this is one thing that I am most proud of.

Customer Experience Over Time

Value is the critical driver of overall client satisfaction.

Value perceptions for your practice based on length of relationship are set out below:



Because Core Data collects so much data from many different organisations and their customers, they are able to show the likely success of a business by how positive their customers speak, act and promote their experience of the business. This is known as a Net Promoter Score or NPS

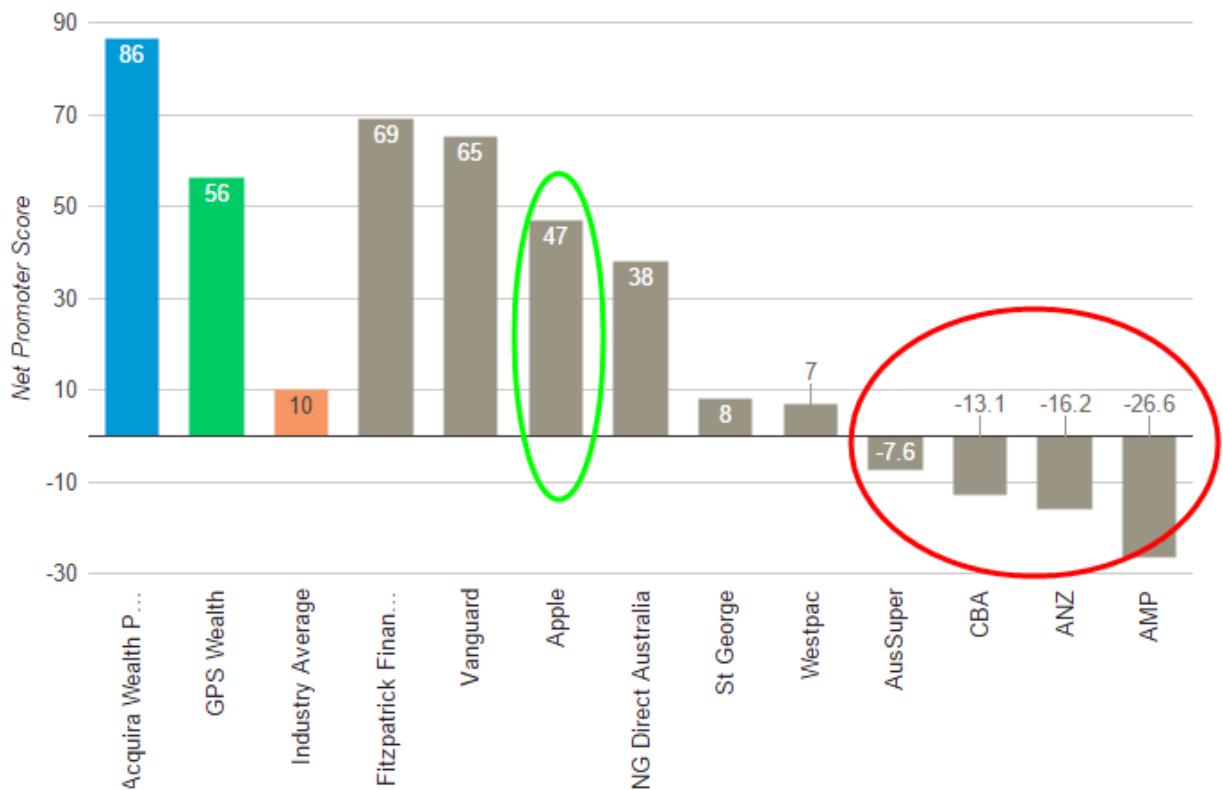
What stands out for us most is the lack of satisfaction with people in the financial planning industry in general with a score of only 10. Even worse is the score received by Australia's largest superannuation fund and the big banks with negative scores.

NPS In Context

Acqira Wealth Partners has an NPS score of 86.4.

This is 30.2 points ahead of the GPS Wealth Average NPS of 56.2.

The graph below also compares results to well-known brands across a range of industries.



SATISFACTION

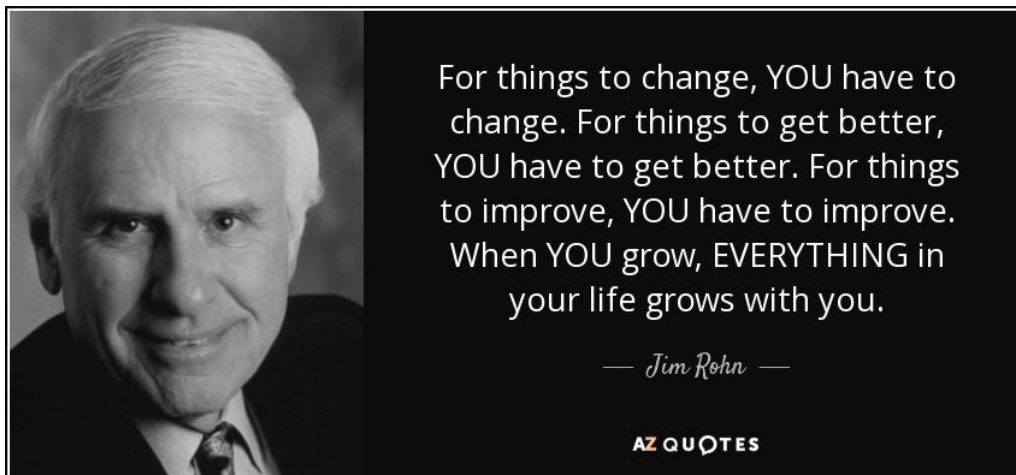


Results

Your clients' ratings of their experience across ten key satisfaction metrics, compared to Industry Averages and GPS Wealth group average, are set out below:

Satisfaction Elements	Your score	GPS Wealth Average	Industry Average
Support staff	95	88.3	81.8
Financial knowledge and expertise	95.7	90.8	83.7
Business relationship	95.9	90.4	82
Understanding	95.2	90	83
Strategy	93.4	86.8	80.7
Implementation	89.4	87.9	77.1
Financial review process	94.3	86.4	80.2
Communication	96.1	89	79.5
Value	94.3	86.3	77.8
Overall satisfaction	95.5	88.2	80.4
ROLLUP Score	94.5	88.4	80.6

The area we need most improvement is on our implementation and so over the last week we have been developing a new implementation process. We believe that this will ensure better communication and a more efficient process.



CLIENT COMMENTS

Reine Clemow

"I'm satisfied because of the trusted relationship I have with my financial advisor."

"Very happy with Reine and trust him fully. Easy to do business with."

"Nothing is too much effort. Always available"

"Reine has been a pleasure to work with and always takes time to explain the detail. Hopefully we will see long term gains as a result of the strategy we now have in place. "

"Because we are very satisfied with his financial advice and his manner."

"Our financial adviser does a fantastic job, is extremely professional and deserves the recognition."

"Reine and I have developed an excellent understanding of each other's beliefs in the necessary combination of client/financial adviser and this has helped us forge a trust in each other's role in our business relationship."

"Reine is very easy to communicate and he understands my need."

"Because this is my honest opinion based on our ongoing relationship during the last five years."

"I am very satisfied with my financial adviser and I gave a nine because there can always be some improvements."

"Reine Clemow has been my financial adviser for nearly 15 years, have formed a close and friendly relationship over the years and i believe that he will continue to guide me in my financial matters."

"My financial adviser's management of my financial affairs has allowed me to retire with the knowledge that my future is financially secure and this has given me peace of mind and has allowed me to enjoy my retirement. "

"I am totally satisfied with the service provided."

"We are very happy."

"Over the time we have been with Reine his advice has successfully assisted us in achieving financial security for our retirement."

"Excellent knowledge and understanding of the financial situation as it affects myself and my favourite wife."

"He understands my needs"

"Be cos he the best"

"Because I know that if I need any help/advice it is sorted out straight away"

"Because I like the product and the service"

"We have found him yo be reliable over the years"

"Very friendly and easily understood"

"Personal contact; superior communication skills; caring; confident."

"Integrity, openness, availability"

"He understands our financial retirement needs and we consider him a good friend as well."

"Prompt response to any questions. Reine has an extremely good understanding of my needs and past family history. Travels to see me every year and keeps me well informed. "

"Our advisor is excellent and interested in us and our needs and if we have a query no matter how small he always answers us and is available at any time to us."

"Very helpful and understanding, friendly and excellent communication skills "

"Reine and his team provide an excellent service for which I am extremely satisfied with."

"We have minimal contact but are confident in the quality of service we receive."

"Excellent service supplied, and they are always willing to assist "

"My Financial Advisor Reine Clemow has been my Advisor now for just over 10 years. He has always been proactive in setting up meetings and has been most informative and helpful with advice."



*Thank
you*

