

WJM FINANCIAL, LLC

Fee-only financial planning and investment management

Bill Moeckel, CFA, CFP™
President

Client Survey Results

As you know, I recently hired an independent consulting firm, Advisor Impact, to conduct a client survey and to review and analyze the results. My objective was to gain a better understanding of your needs and interests, and to ensure that I am providing a level of service that meets or exceeds your expectations.

I sincerely thank everyone who participated in the survey. I know that December and January were very hectic months, and I truly appreciate your cooperation. Our response rate was very good, and the information gathered is invaluable.

The results of the survey were compiled and finalized last week, and they were very encouraging. Our overall client satisfaction score was **4.9 out of 5.0**, and the average score for each of the satisfaction related questions ranged from 4.7 to 5.0 (out of a possible 5.0). Additional details are provided in the following table:

| SATISFACTION RELATED ISSUE | OVERALL SCORE |
|---|-----------------------|
| My advisor fully understands my goals | 5.0 out of 5.0 |
| My advisor is trustworthy | 5.0 out of 5.0 |
| Range of services meets all of my financial needs | 4.7 out of 5.0 |
| Performance of portfolio meets expectations | 4.7 out of 5.0 |
| Advisor takes a proactive approach to managing my investments | 4.8 out of 5.0 |
| Problems are quickly resolved | 5.0 out of 5.0 |
| Calls and emails are promptly returned | 4.9 out of 5.0 |
| Frequency of contacts meets my needs | 4.9 out of 5.0 |
| Difficult concepts are clearly explained | 4.9 out of 5.0 |
| Willing to refer to friends and family | 5.0 out of 5.0 |
| Overall client satisfaction | 4.9 out of 5.0 |

Needless to say, I am pleased with these results and I am happy that efforts to provide exceptional service and advice are recognized and appreciated by our clients. As gratifying as the results are, however, there are opportunities to improve. While the lowest *average* score for any question was 4.7, there were naturally individual responses slightly above and below that average. My goal is to improve all of those scores in future surveys.

Thank you again for your cooperation and objective feedback. I encourage your continued suggestions for how I might improve my service.

Sincerely,

Bill Moeckel, CFA, CFP