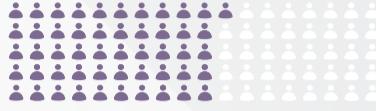


Client survey

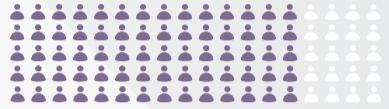
2023

QUESTION

What do you value the most about the service your adviser provides to you?



70%
Expertise

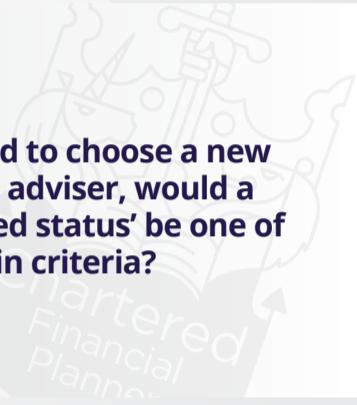


QUESTION

67%

Yes

If you had to choose a new financial adviser, would a 'Chartered status' be one of your main criteria?



QUESTION

At what age did you first take financial advice?



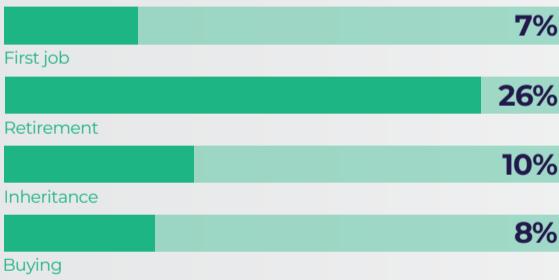
Under 40



41-59



60 over



QUESTION

Was there a particular event that triggered this?

QUESTION

What keeps you awake at night regarding your finances and/or investments?



Having enough money for retirement



Funding future care home fees



Scammers