



## **Client Survey 2018**

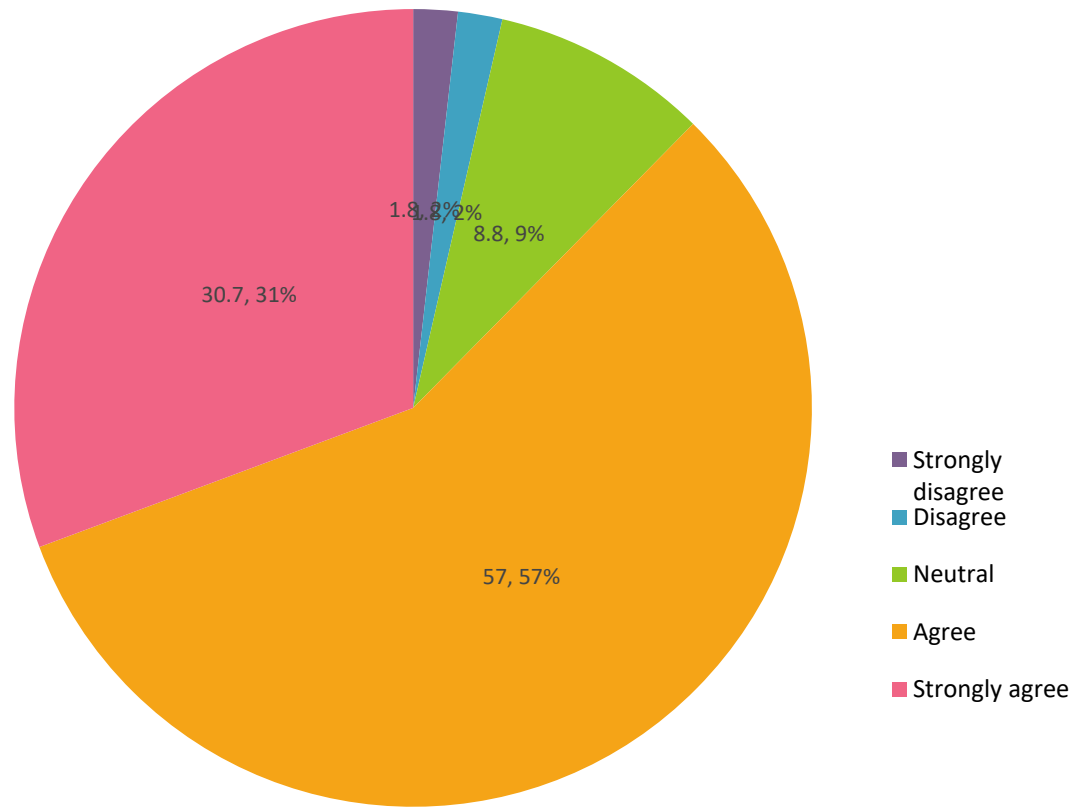
**120 clients completed during May/June 2018**



# Do you feel your adviser understands you and your financial needs?



88% Agreed – a very strong positive result

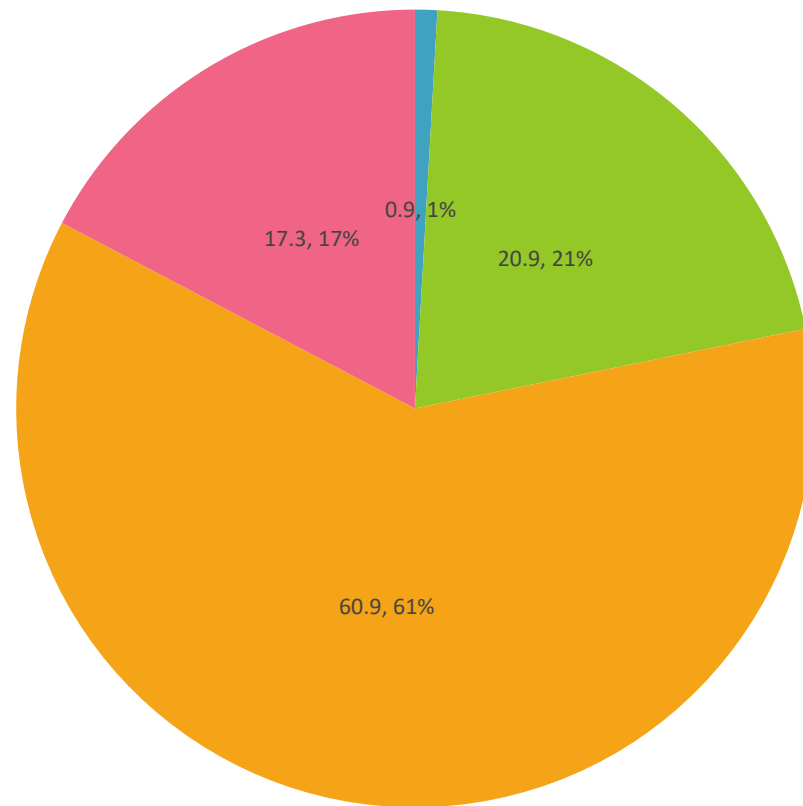


...helping you make the right financial decisions for both now & the future

# Are you on track to achieve what you want?



78% feel they are on track -  
We would love to ensure 100% of our clients feel they are on-track to achieve their life goals



- Disagree
- Neutral
- Agree
- Strongly agree



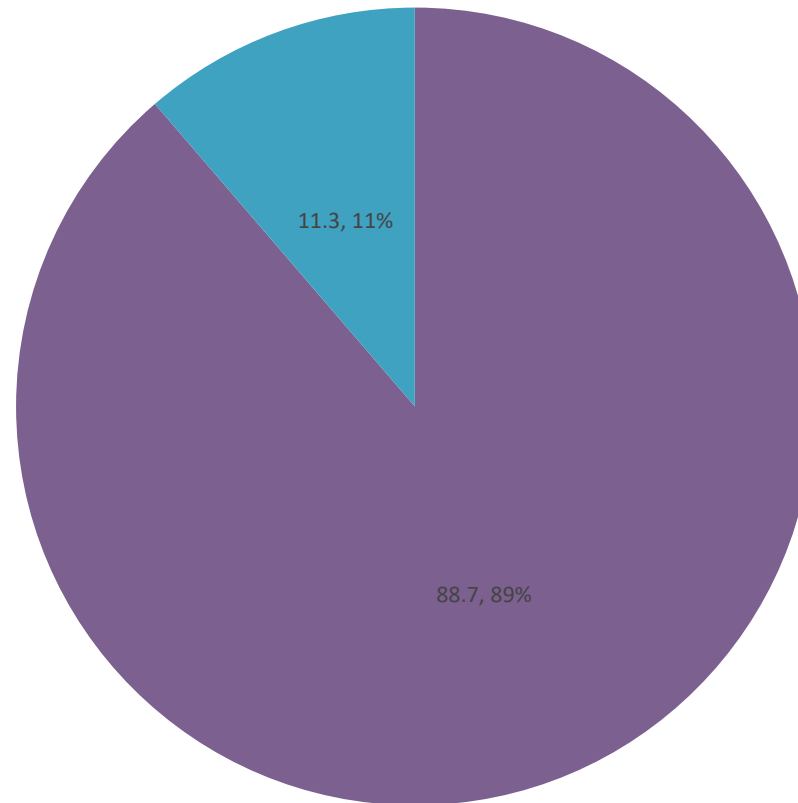
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# Is the communication & news you receive from FM Financial frequent enough?



If you would like more frequent or more specific new & communication please let your Adviser know – we are happy to discuss and understand your requests.



■ Yes  
■ No

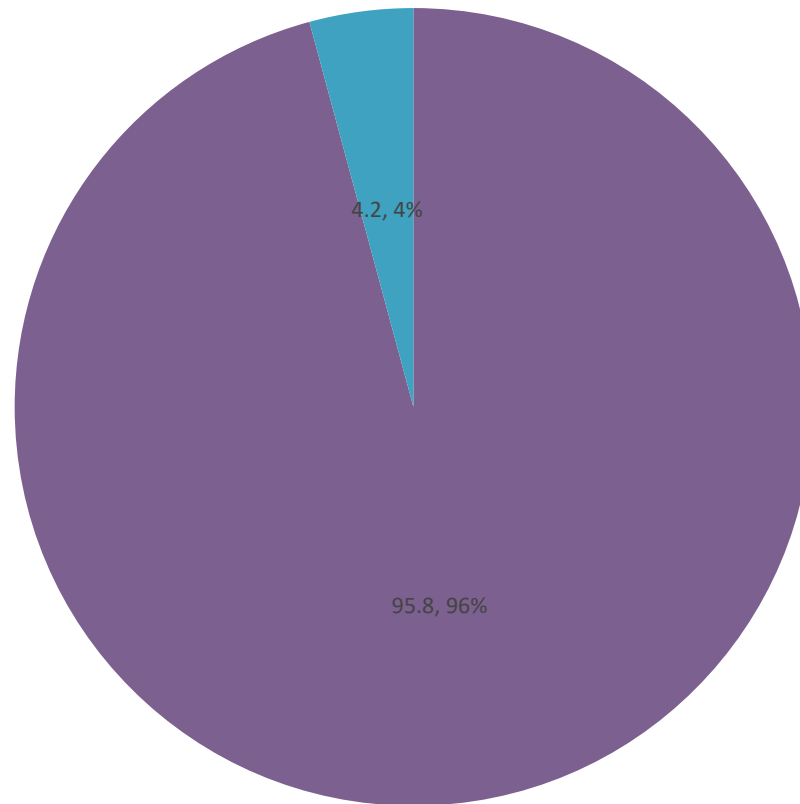


*...helping you make the right financial decisions for both now & the future*

# Do you have confidence in FM Financial to handle your finances?



96% confidence – We are so thrilled with this result!



■ Yes  
■ No



*...helping you make the right financial decisions for both now & the future*



# Some Client Quotes...



## Team Cheers!

- *Have been doing business with you about 15 years never once in all that time have we not been completely satisfied. Well done all thank you*
- *I have found Robert Holt and staff to be professional, helpful and caring in attending to our financial situation and planning the financial aspects of our future. With Thanks*
- *I have found Sam great, plus the rest of his team, Janine is always a pleasure to talk to and they are extremely helpful.*
- *Very happy Leanne Stokes is wonderful and extremely helpful and very approachable*

Thank you for these comments!

If you have requests or would like to feedback your specific comments please contact your Adviser or Denis Harrington - [denis.harrington@fmfinancial.com.au](mailto:denis.harrington@fmfinancial.com.au) or 03 98724833.

