

OUR SERVICE RATING



Face to face meeting



Ease of access to your adviser at Innes Reid



Our understanding of your financial needs



Our written recommendations



Our newsletter updates



The administration service we deliver



WOULD CLIENTS RECOMMEND US?

(on a scale of 0 - not likely, 10 - very likely)



HOW DID WE PERFORM DURING THE PANDEMIC?

(on a scale of 0 - below expectations, 10 exceeded expectations)



HOW DO OUR CLIENTS RATE OUR PERFORMANCE?

Trustworthy		98%
Approachable		99%
Reliable		98%
Professional		99%
Consistent		98%
Efficient		97%
Clarity in your personal finances		97%
Sense of financial security		98%



WHAT ARE THE TOP FEARS WHEN IT COMES TO FINANCIAL PLANNING?

- Charges and fees
- Inflation
- Stock market volatility
- Debt
- Disclosing personal details
- Tax implications
- Not having enough income in retirement
- Funding later life care
- Understanding advice process