

MERCER & ASSOCIATES WEALTH MANAGEMENT LTD

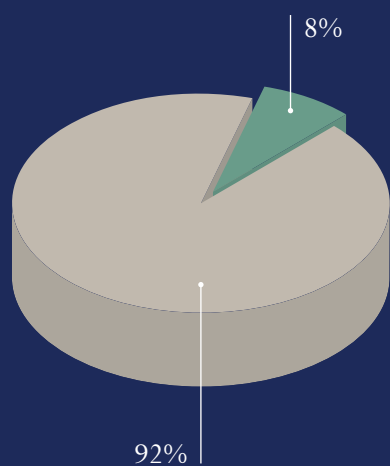
PARTNER PRACTICE OF



ST. JAMES'S PLACE
WEALTH MANAGEMENT

2011 CLIENT SURVEY RESULTS

Following a very positive response to the Mercer & Associates Client Survey, we have produced this short summary of key messages. The online survey covered five key sections: overall satisfaction, the experience of the service we provide, current concerns/information requirements, communication preferences and any final observations. We invited a limited number of clients to participate in our survey of which 26 responded.



Client Satisfaction

We were delighted to receive an average satisfaction score of 4.9 on a scale of 1-5, with 5 being 'very satisfied'. 100% of clients rated their satisfaction levels as either 'very satisfied' or 'quite satisfied'. We were very proud of this result and it is a testament to the long term relationship that we have built and continue to enjoy with our clients.

- Very satisfied
- Quite satisfied

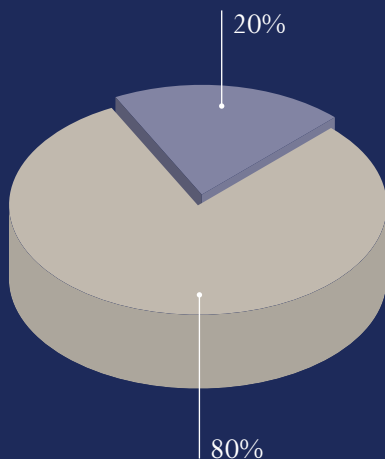
“ 100% of our clients rated their satisfaction levels as either 'very satisfied' or 'quite satisfied'. ”

“ 100% of clients rated the overall quality of our advice as ‘excellent’ or ‘good’ ... ”

Experience of our service

100% of clients rated the overall quality of our advice as ‘excellent’ or ‘good’ which tells us we are achieving our aim of providing clear and concise financial planning with all of our clients.

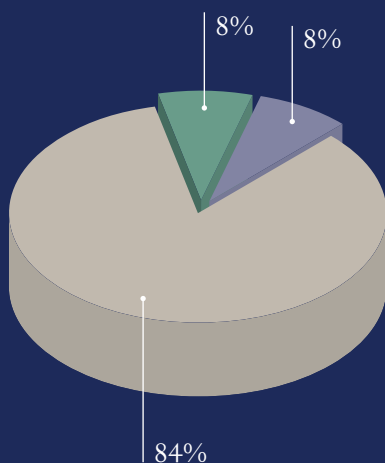
64% of clients rated our frequency of contact as ‘excellent’ and 36% rated this as ‘good’. Although these are positive figures, we will continue to ensure that our clients receive the highest standard of communication from us.



Efficiency of our service

Efficiency of our service was also rated by 100% of clients as either ‘excellent’ or ‘good’. The results showed clients have a positive experience with the interaction of our office staff with 80% of clients rating the helpfulness and efficiency of staff as ‘excellent’.

- Excellent
- Good



How has client satisfaction changed?

84% of clients stated their satisfaction level ‘had not changed at all’ with 16% stating they are ‘much more satisfied’ or ‘slightly more satisfied’.

- Satisfaction level has not changed
- Much more satisfied
- Slightly more satisfied



“ 100% of our clients would be happy to recommend us. ”

Our business grows entirely from personal introductions and referrals. We are very passionate about building long term relationships with all of our clients founded on trust, excellent service and personal face-to-face advice.



I am sincerely grateful to my clients who took the time to provide us with invaluable feedback. Thank you for your support. It was rewarding for us to hear the ongoing service we provide our clients is received so positively and adds maximum value. We will continue to review and enhance our service on a regular basis to ensure we always meet client expectations.

**Darren Mercer, Managing Director
Mercer & Associates Wealth Management Ltd**

“ I have found Darren Mercer and his staff extremely professional and courteous with providing concise and agreeable advice with financial solutions during a time when financial certainty isn't clear. ”

Paul Teece, Director of GP Fire & Security Ltd

“ We are very satisfied with the service of Mercer & Associates. They have given us complete confidence in them, looking after our finances. ”

Liz & Ken Roper, Private Clients

“ I have entrusted Darren to look after my succession and estate planning through the appropriate life policies, trusts and will. Darren has paid excellent attention to every detail in these matters and I will continue to work with him on amending these plans throughout my progression in life. I have always found Darren and his team, including associates, to be amongst the most professional and courteous people I have worked with. ”

**Mark Whitehouse, Managing Director
of Whitehouse Leisure Park Ltd**

“ Darren has an amazing passion and enthusiasm for what he does and is dedicated and committed to his clients. He is one of the most genuine people I have ever met he is a true professional who operates with the highest degree of integrity and honesty. I trust him completely and have already introduced him to a number of colleagues and friends. I would have no hesitation in recommending him to anyone. He is a truly exceptional individual who is a pleasure to know. ”

Wendy Tarpey, Freelance IT Consultant

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