



BERRY & OAK

CHARTERED FINANCIAL PLANNERS

# Client Satisfaction Survey Results

Berry & Oak  
Data from Summer 2019



# At Berry & Oak our mission is always to deliver real value to our clients and ensure that they achieve all of their goals.

We believe the only way to improve your experience and interaction with us is to ask you how you honestly view these things. We felt it was really important to hear from you directly so we could understand what we are doing well, or where we could do things better.

Firstly, we would like to thank those of you who took part in our survey. We had a very strong and encouraging response. We plan to conduct this survey on an annual basis, so there will be further opportunities to take part, if you'd like to do so.

We pride ourselves on taking time, taking care and paying attention when it comes to you and your family, and we will continue to focus firmly on these areas. We always want you to feel that we provide you with all the support and time you need and that you feel we really understand your personal situation.

This document summarises the key insights from our Client Survey and highlights what we intend to do in 2020 and beyond to initiate change and improvements. We wish to thank everyone who took part in the survey and shared their thoughts and comments.

## **Your contribution was invaluable to us.**



Andrew D Elson FPFS CFP™  
Chartered FCSI  
Chartered Financial Planner  
CERTIFIED FINANCIAL PLANNER™ professional

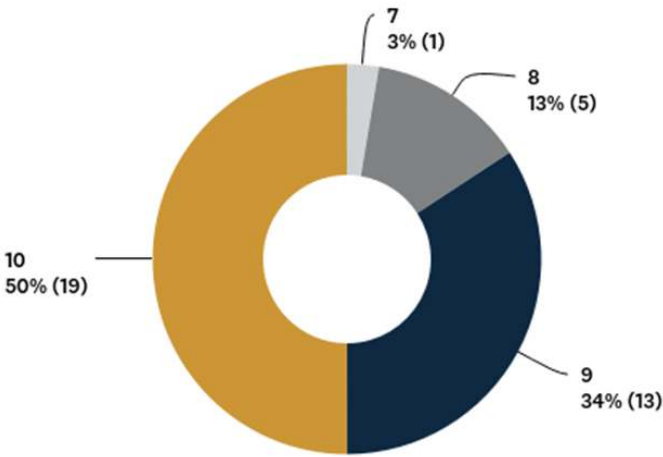


Sarah Elson DipPFS  
Chartered MCSI  
CERTIFIED FINANCIAL PLANNER™ professional

1. We asked "How satisfied are you with the services provided to you by Berry & Oak? On a scale of 1-10 where 1 is not at all satisfied, and 10 is extremely satisfied."

84%

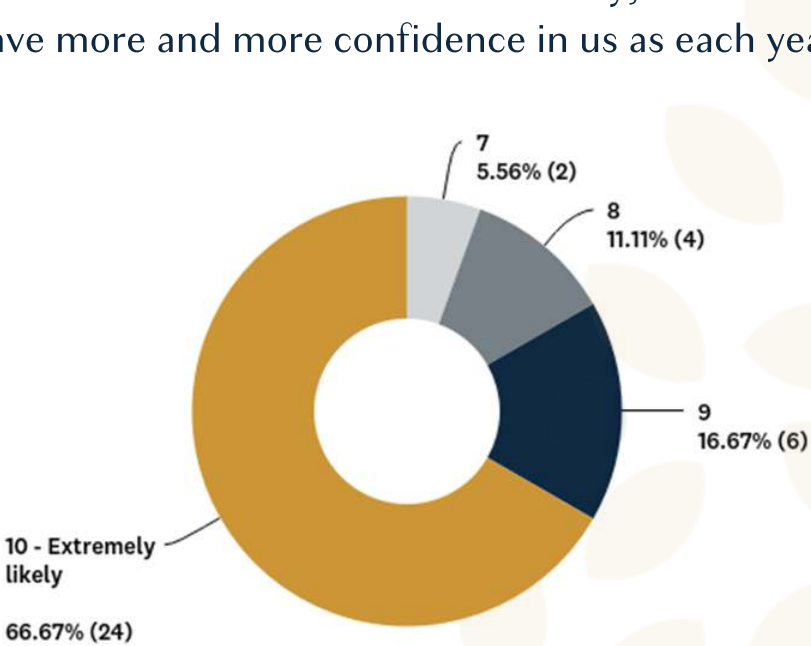
**Overall Satisfaction**  
84% of clients who completed the survey gave a score of 9 or 10 out of 10. The remaining 16% were still satisfied rating Berry & Oak a 7 (1 person) or 8 out of 10. **10 out of 10 was the most popular response.**



Overall we feel the results were very positive with no clients being dissatisfied with the services they receive from us. There was also an 11.11% increase in clients who were 'extremely satisfied' since 2017, which reflects the initiatives we've put in place over the last 2 years.

2. We asked "How likely are you to recommend Berry & Oak to a friend or colleague who needs help with their financial planning? Please answer on a scale of 1-10 where 1 is not at all likely and 10 is extremely likely"

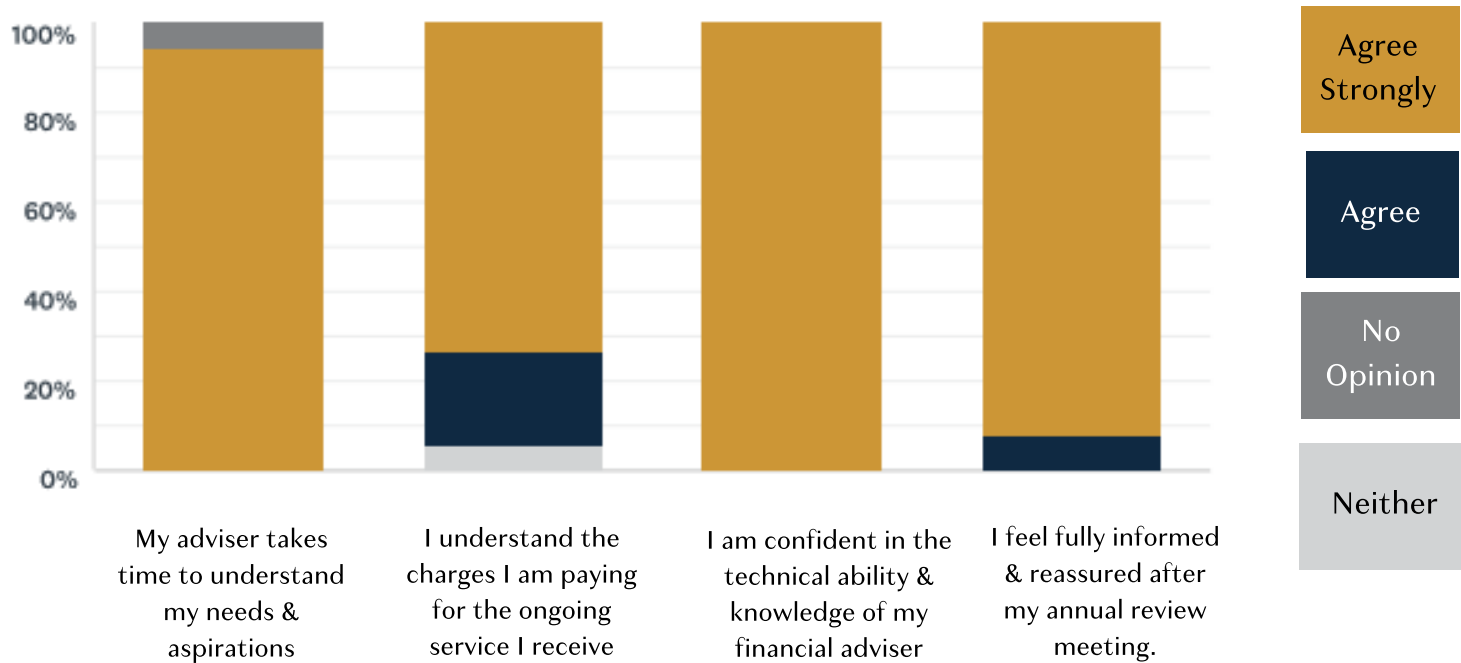
Our clients being extremely likely to recommend us, is the best indication we are serving and looking after our clients well. Our clients can feel good about recommending our services to their network of friends or family when they see a need. This is an increase of 2% since our last survey, so we know our clients have more and more confidence in us as each year passes.



83%

**Extremely Likely or Very Likely to recommend**  
These results are really pleasing to us and shows our hard work and business processes are paying off. However, we know we can always improve and have some ideas, detailed later in the report.

3. We asked "How strongly do you agree with the following statements" Where 1 was the lowest score and 5 was the highest score.



Overall we feel the results were very positive with no clients disagreeing with the statements and the majority of clients agreeing strongly.

100%

Technical Knowledge & Abilities

This was one of the strongest performing statements with 100% of clients agreeing strongly that they are confident in the technical abilities and knowledge of their adviser.

This was one of the strongest performing statements with 100% of clients strongly agreeing that their adviser takes time to understand their needs and aspirations.

100%

Understand my Needs & Aspirations

95%

Clarity on Fees

Our clients agree that they understand what they are getting, how their products work and the fees they are being charged for this.

We were pleased to hear that 100% of our clients agreed that they felt informed and reassured after their annual review meeting.

100%

Feel Reassured & Informed

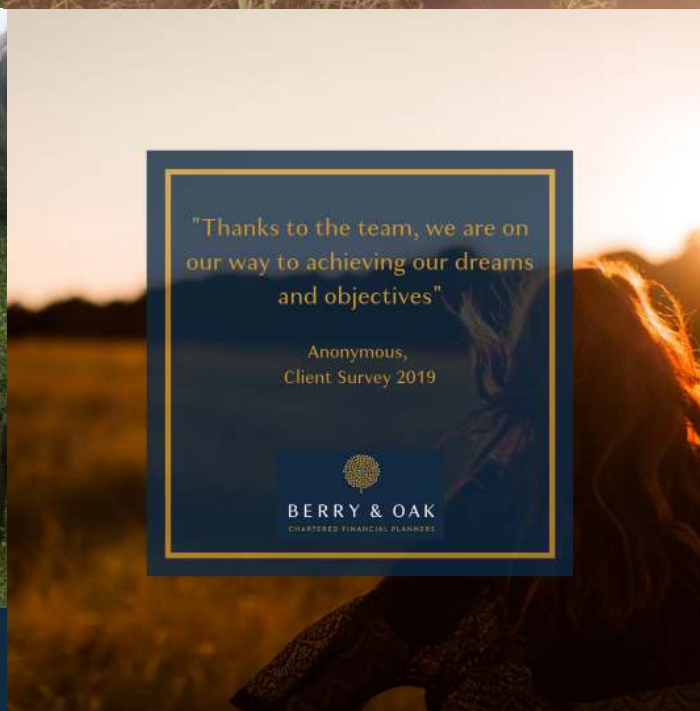
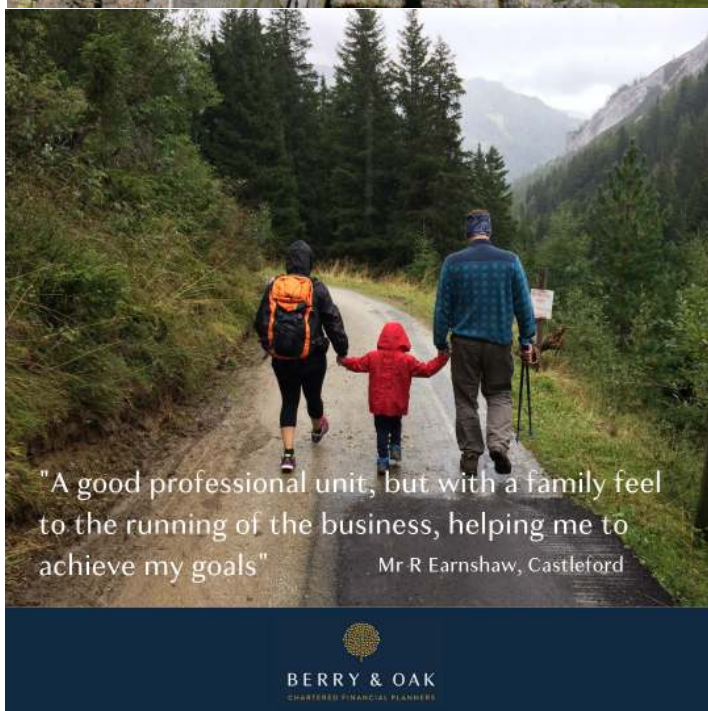




## Client Testimonials




We invited our clients to share with us their "thoughts on the services, professionalism, friendliness, and knowledge of our team, as well as whether we had helped them to achieve their dreams and objectives."






## We asked our clients to share we us their "most memorable experiences of working with us"

A photograph of a man, a woman, and a young child standing in a grassy field. The man is leaning in to kiss the child's head, and the woman is holding the child. They are all smiling and looking down at the child.


We always feel encouraged and optimistic following any of our meetings with Andrew.

Anonymous, 2019

A photograph of a rural landscape featuring a stone wall in the foreground, a dirt path leading through tall grass, and rolling green hills in the background under a cloudy sky.


"Being told, for the first time, that early retirement was possible"

Anonymous, Client Survey 2019

A photograph of a person seen from behind, wearing a dark jacket and a beanie, looking out over a landscape under a dramatic, cloudy sky.

"I never feel rushed or pressured during my annual review. My questions are always answered honestly and truthfully so that I can make informed decisions."

Mrs S Frost, 2019

A photograph of a person wearing a yellow hat and a dark jacket, standing in a field with a body of water in the background.

"Andrew's drawings on the flip chart - pictures and diagrams helped so much in our understanding of our situation. We never realised what was possible until that point"

Mrs C Huckfield, 2019



## What are we doing now?

We have enjoyed listening to your helpful feedback. Below we have listed what we plan to change in our commitment to improving our service further.

### Review Meetings

A range of meeting agendas will be developed and rolled out by the end of 2019, and issued to you before the meeting, so you know what to expect and can be better prepared.

### Berry & Oak Personal Finance Portal

We will add to our range of client user guides explaining how you can use the portal more efficiently and get more value from it.

### Berry & Oak Personal Finance Portal

One of the team will give you a live demonstration of the portal at your next review meeting, so you can see it in action.

### The Fees You Pay

We will provide a personalised, clear and concise summary of the fees you pay and demonstrate the value they add at your review meeting.

Thank you for all your feedback,  
Andrew, Sarah & the Team at Berry & Oak



You're in safe hands **with Berry & Oak.**

**CISI Accredited Financial Planning Firm™**

As an Accredited Financial Planning Firm™ we meet the CISI's rigorous ethics, experience, competence and professional practice standards.



**Chartered Financial Planner Firm**

We have been awarded the prestigious title of Chartered Financial Planner which reflects how committed we are to developing and maintaining the knowledge and capability of our people so we can deliver the highest quality advice.

