SpectremGroup
Voice of the Investor

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Are your Wealth Management Clients Happy?
How would you know if you do not ask?

It's time to conduct a client survey with your Wealth Management Clients.

2022 Facts:

Most Wealth Management Clients have not lived through a recession and depend on Advisors and Providers to tell them what to do. Have you asked them for feedback in 2022?

- **76%** of Wealthy Generation X Clients are satisfied with their financial professional.
- **54%** of Millennials are likely to move their assets if their provider lacks the digital tools they desire.

Client surveys are common regardless of the product or industry

Wealth Management Clients are different than retail customers and should be treated with greater knowledge and discretion when they are asked for feedback.

- **How:** Client survey that identifies the satisfaction level of your clients in key areas such as: service, website features, fees, communication, financial planning, advisor relationship, and more.

- **Who:** Spectrem Group has specialized in researching investors in the high net worth industry for over 30 years.

- **What:** Benchmark your organization's results to those of similar providers. Gain key industry insights through comparing to similar firms. Results are displayed through an interactive dashboard that enables segmentation by net worth, assets with your firm, age, and gender.

- **When:** Spectrem is launching the next wave of surveys in November 2022.

- **Where:** This is an online survey that does not require any client identifying information, and is displayed in an easy-to-use online format that allows for customization of results viewing.

- **Why:** Learn satisfaction levels of your clients, gain insights into what drives client satisfaction, and compare your results to other organizations like yourself. Learn investor likelihood to refer to your firm, as well as how loyal they are as clients.

Spectrem Gauge Process:

Step 1 Complete subscription agreement. This will start your complimentary subscription to our High Net Worth journal.

Step 2 Provide Spectrem with a file of customer information through a Spectrem provided template. This information does NOT include client names, only includes email addresses, account balances, age, and gender.

Step 3 Your firm sends emails to clients, encouraging them to complete the survey, and reassuring them of their anonymity.

Step 4 Survey is sent to clients, with a follow-up reminder one week later to those who have not completed the survey. Results are sent directly to Spectrem Group.

Step 5 Spectrem loads results into interactive dashboards that includes your results benchmarked to other providers.

Step 6 Spectrem provides a conference call to review key findings of your client feedback and provide actionable guidance to improve client satisfaction.