

McILRATH | ECK

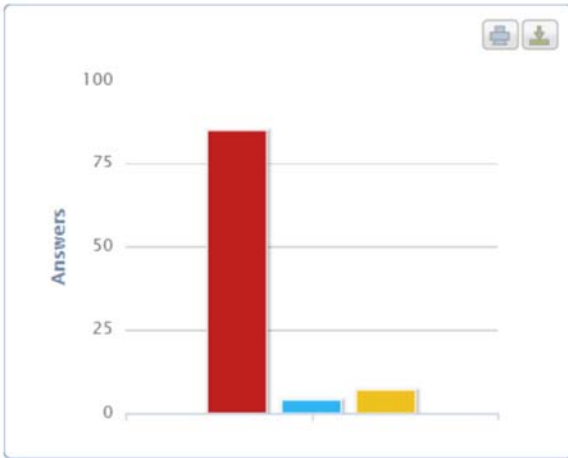
INVESTMENT - RETIREMENT - LEGACY PLANNING

A photograph of an elderly couple, a woman with short blonde hair and a man with grey hair, both smiling and looking at a tablet computer. The woman is pointing at the screen. They are dressed in light-colored clothing. The background is a plain, light color.

**2015 CLIENT SURVEY
RESULTS**

1. Do you feel it is important for your advisor to provide you with educational opportunities about the markets, investments and insurance, such as newsletters or workshops?

Statistics diagram

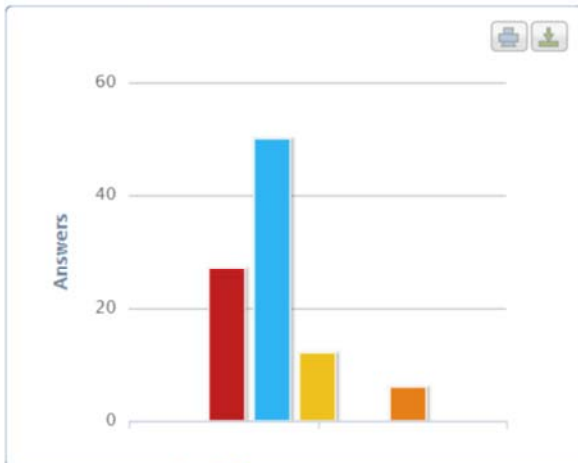


Numeric statistics

Question Options	Number of answers	Percent
Yes	85	88.5%
No	4	4.2%
I don't know	7	7.3%
Summary:	96	

2. Please rate the following communications or activities that you receive from your advisor in terms of their value to you.
Retirement.Track.Newsletter

Statistics diagram

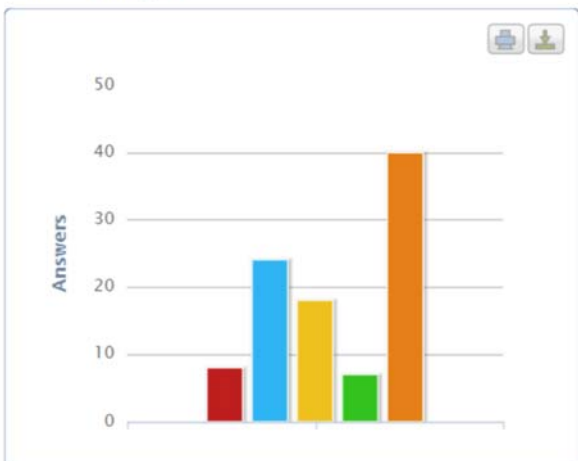


Numeric statistics

Question Options	Number of answers	Percent
Very valuable	27	28.42%
Somewhat valuable	50	52.63%
Of little value	12	12.63%
Not at all valuable	0	0%
I don't know	6	6.32%
Summary:	95	

3. Client Dinner Events

Statistics diagram

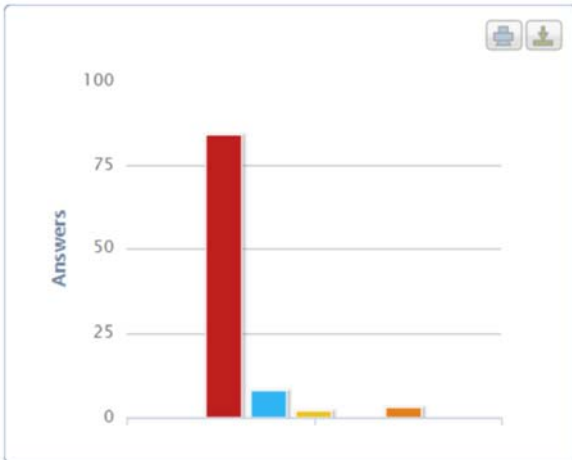


Numeric statistics

Question Options	Number of answers	Percent
Very valuable	8	8.25%
Somewhat valuable	24	24.74%
Of little value	18	18.56%
Not at all valuable	7	7.22%
I don't know	40	41.24%
Summary:	97	

4. Client Review Meetings

Statistics diagram

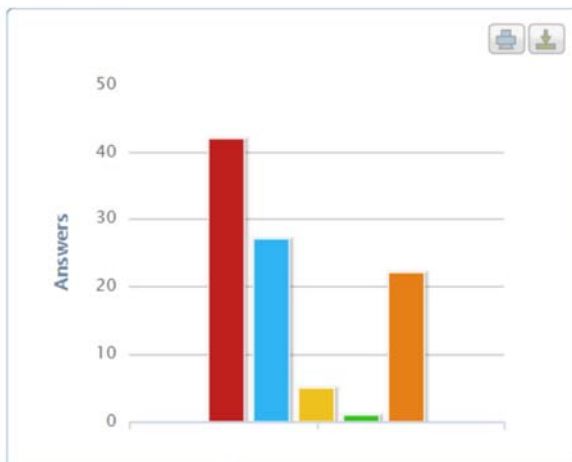


Numeric statistics

Question Options	Number of answers	Percent
Very valuable	84	86.6%
Somewhat valuable	8	8.25%
Of Little value	2	2.06%
Not at all valuable	0	0%
I don't know	3	3.09%
Summary:	97	

5. Educational Forums

Statistics diagram

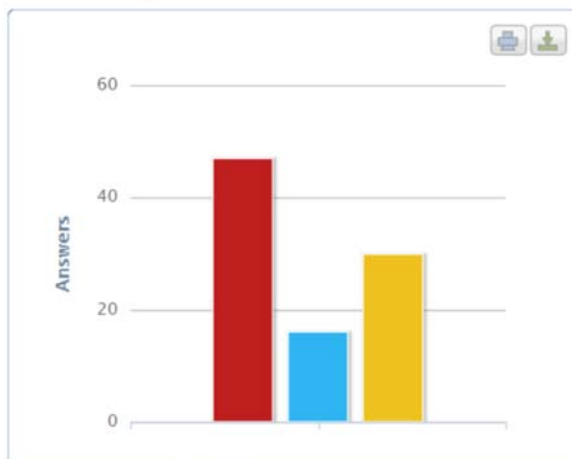


Numeric statistics

Question Options	Number of answers	Percent
Very valuable	42	43.3%
Somewhat valuable	27	27.84%
Of little value	5	5.15%
Not at all valuable	1	1.03%
I don't know	22	22.68%
Summary:	97	

6. McIlrath & Eck is in the planning stages of holding a cider press party this Fall. Would you have any interest in attending this type of event?

Statistics diagram

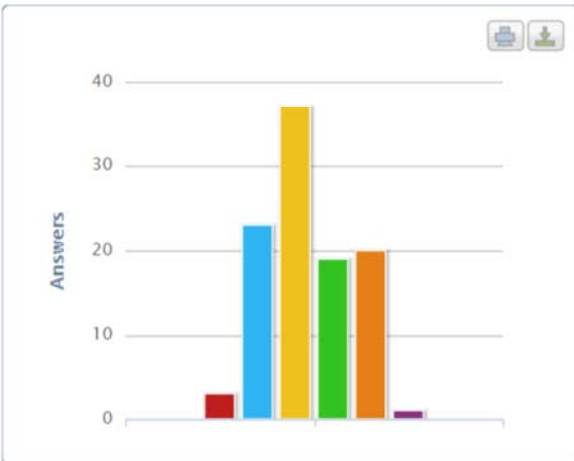


Numeric statistics

Question Options	Number of answers	Percent
Yes	47	50.54%
No	16	17.2%
I don't know	30	32.26%
Summary:	93	

7. In a 12-month period, how often do you expect to meet (either face-to-face or by telephone), to discuss your financial plan?

Statistics diagram

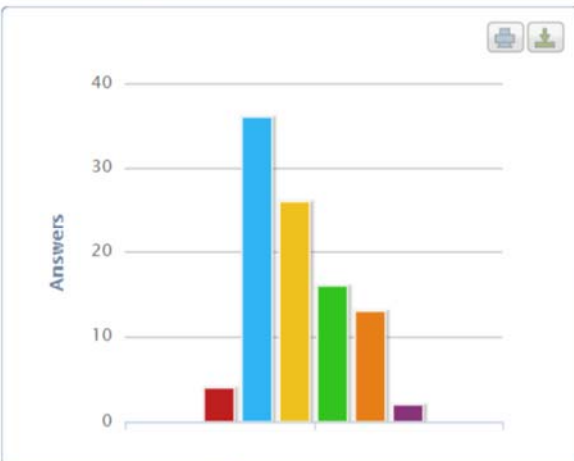


Numeric statistics

Question Options	Number of answers	Percent
None	3	2.913%
1	23	22.33%
2	37	35.922%
3	19	18.447%
4	20	19.417%
5+	1	0.971%
Summary:	103	

8. Of the meetings indicated above, how many do you feel should be face-to-face, rather than by telephone? If you prefer all meetings to be face-to-face, select the same number as above.

Statistics diagram

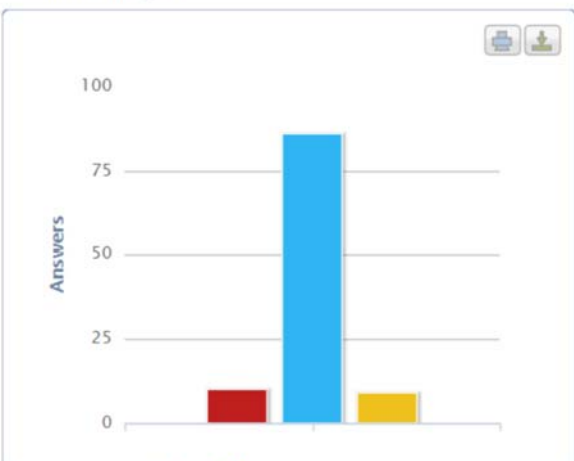


Numeric statistics

Question Options	Number of answers	Percent
None	4	4.124%
1	36	37.113%
2	26	26.804%
3	16	16.495%
4	13	13.402%
5+	2	2.062%
Summary:	97	

9. How would you prefer to receive written communications from your financial advisor? Please select one.

Statistics diagram

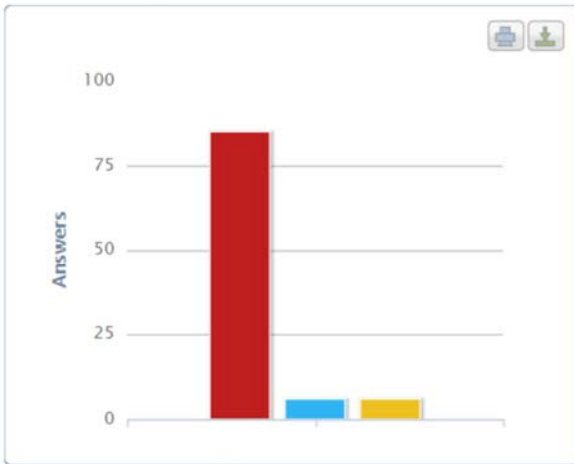


Numeric statistics

Question Options	Number of answers	Percent
By mail	10	9.524%
By email	86	81.905%
No preference	9	8.571%
Summary:	105	

10. Are you comfortable discussing the administrative details of your financial plan with someone on your financial advisor's support team?

Statistics diagram

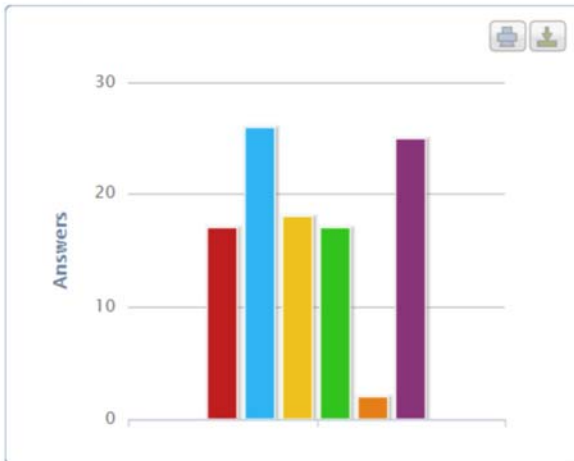


Numeric statistics

Question Options	Number of answers	Percent
Yes	85	87.629%
No	6	6.186%
I don't know	6	6.186%
Summary:	97	

11. When was your Will last updated?

Statistics diagram

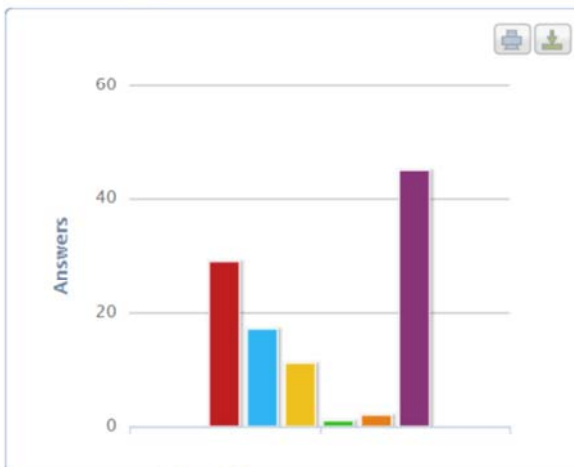


Numeric statistics

Question Options	Number of answers	Percent
I don't know	2	1.9048%
I don't have a Will	25	23.8095%
Within the last year	17	16.1905%
2-5 years	26	24.7619%
6-10 years	18	17.1429%
More than 10 years	17	16.1905%
Summary:	105	

12. When did you last hold a family meeting to discuss plans for your estate?

Statistics diagram

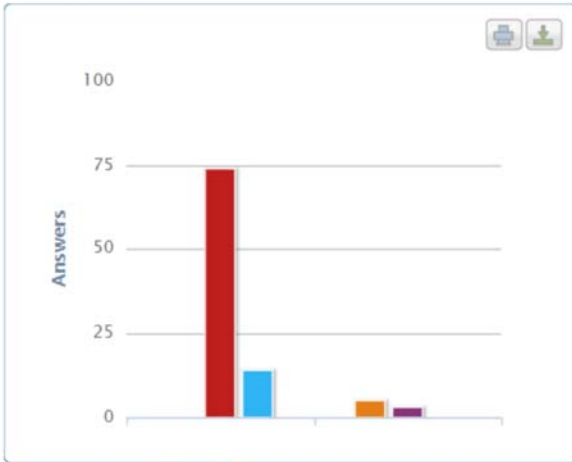


Numeric statistics

Question Options	Number of answers	Percent
Within the last year	29	27.619%
2-5 years	17	16.1905%
6-10 years	11	10.4762%
More than 10 years	1	0.9524%
I don't know	2	1.9048%
Never	45	42.8571%
Summary:	105	

13. When was your financial plan last updated?

Statistics diagram

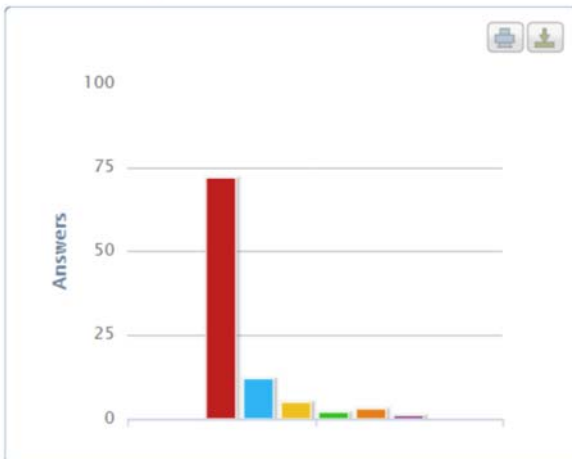


Numeric statistics

Question Options	Number of answers	Percent
Within the last year	74	77.0833%
2-5 years	14	14.5833%
6-10 years	0	0%
More than 10 years	0	0%
I don't know	5	5.2083%
I do not have a financial plan	3	3.125%
Summary:	96	

14. I would recommend the services of my financial advisor to family, friends and colleagues.

Statistics diagram



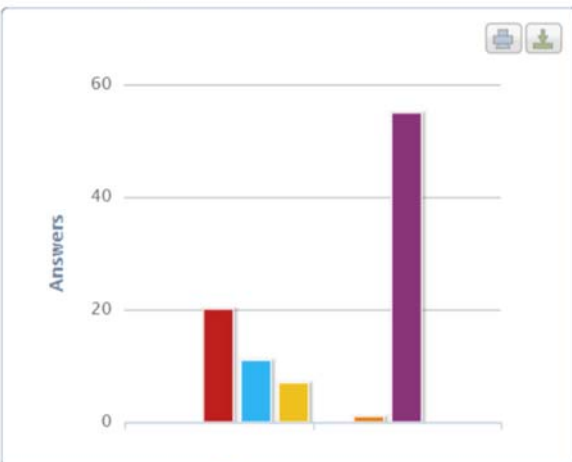
Numeric statistics

Question Options	Number of answers	Percent
Strongly agree	72	75.78947%
Somewhat agree	12	12.63158%
Neutral	5	5.26316%
Somewhat disagree	2	2.10526%
Strongly disagree	3	3.15789%
I don't know	1	1.05263%
Summary:	95	

15. With which, if any, of the following professional advisors do you work? Beside each, indicate your level of satisfaction with your relationship with that individual.

Lawyer

Statistics diagram

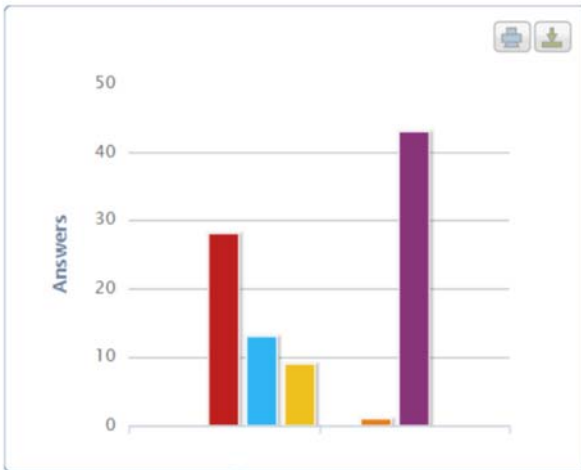


Numeric statistics

Question Options	Number of answers	Percent
Very satisfied	20	21.2766%
Somewhat satisfied	11	11.70213%
Neutral	7	7.44681%
Somewhat dissatisfied	0	0%
Very dissatisfied	1	1.06383%
Not applicable	55	58.51064%
Summary:	94	

16. Accountant

Statistics diagram

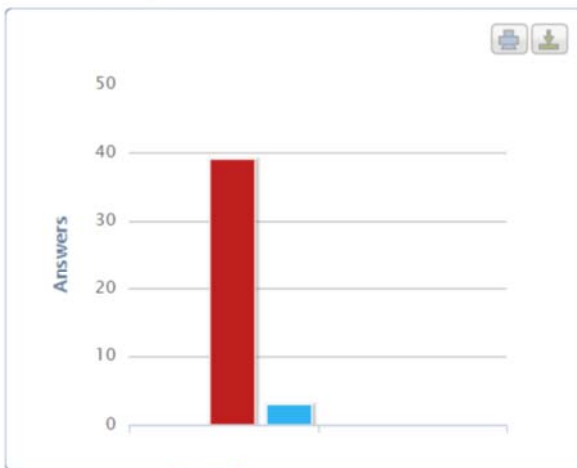


Numeric statistics

Question Options	Number of answers	Percent
Very satisfied	28	29.78723%
Somewhat satisfied	13	13.82979%
Neutral	9	9.57447%
Somewhat dissatisfied	0	0%
Very dissatisfied	1	1.06383%
Not applicable	43	45.74468%
Summary:	94	

17. If you indicated that you work with another financial advisor, including the individual who has sent this survey, with how many financial advisors do you work?

Statistics diagram



Numeric statistics

Question Options	Number of answers	Percent
2	39	92.85714%
3	3	7.14286%
4	0	0%
5 or more	0	0%
Summary:	42	