

1 | How important is it to you that McIlrath & Eck offers educational opportunities about markets, investments, and insurance through newsletters or workshops?

Statistics diagram

0204060Answers

Numeric statistics

Question Options	Number of answers	Percent
Extremely Important	14	11.6%
Very Important	50	41.3%
Moderately Important	40	33.1%
Slightly Important	12	9.9%
Not Important	5	4.1%
Summary:	121	

2 | How often do you read our monthly newsletter "Investment Watch"?

Statistics diagram

0204060Answers

Numeric statistics

Question Options	Number of answers	Percent
Every Month	50	41.3%
Often	27	22.3%
Sometimes	29	24%
Rarely	8	6.6%
Never	7	5.8%
Summary:	121	

3 | Are there certain subjects you would like to see us cover in our newsletter, or other workshops you would be interested in attending? If so, please elaborate:

Statistics diagram

Numeric statistics

0204060Answers

Question Options	Number of answers	Percent
<i>open question</i>	47	100%
Summary:	47	

4 | What is your preferred method of communication from our advisors and staff?

Statistics diagram

0255075100Answers

Numeric statistics

Question Options	Number of answers	Percent
Telephone	20	16.3%
Email	87	70.7%
Text	2	1.6%
No Preference	14	11.4%
Summary:	123	

1 | If you have assets invested with us, how valuable is the information you receive from Portfolio Review Meetings?

Statistics diagram

0204060AnswersModerately Valuable: 10

Numeric statistics

Question Options	Number of answers	Percent
Extremely Valuable	50	41.32%
Very Valuable	48	39.67%
Moderately Valuable	10	8.26%
Slightly Valuable	3	2.48%
Not Valuable	1	0.83%
Not Applicable - I do not have assets under management	9	7.44%
Summary:	121	

2 | If you have regular Portfolio Review Meetings, do you feel you have the opportunity to meet often as you would like?

Statistics diagram

0255075100Answers

Numeric statistics

Question Options	Number of answers	Percent
Yes	92	76.67%
No	5	4.17%
Not Sure	11	9.17%
Not Applicable - I do not have assets under management	10	8.33%
Too often	2	1.67%
Summary:	120	

3 | If you have a Financial Plan, do you feel it is properly updated?

Statistics diagram

0255075100125Answers

Numeric statistics

Question Options	Number of answers	Percent
Yes	98	80.99%
No	4	3.31%
I don't know	13	10.74%
Not Applicable - I do not have a Financial Plan	6	4.96%
Summary:	121	

4 | Are their alternative ways you would like to meet for Portfolio Review or Financial Plan Update meetings?

Statistics diagram

0255075100125Answers

Numeric statistics

Question Options	Number of answers	Percent
Yes, I would like to meet via Skype	9	7.5%
Yes, I would like to meet via conference call	8	6.67%
No, I like meeting face-to-face	103	85.83%
Summary:	120	

1 | What do you value most about your about your advisor?

Statistics diagram

0204060Answers

Numeric statistics

Question Options	Number of answers	Percent
Ability to provide a sense of security/peace of mind	36	30.252%
Knowledge of my personal financial situation	54	45.378%
Client service experience provided	11	9.244%
Investment advice	18	15.126%
Summary:	119	

2 | If you have a financial plan, what information do you value most?

Statistics diagram

0204060Answers

Numeric statistics

Question Options	Number of answers	Percent
Amount I can spend each year	18	15.652%
Progress towards achieving financial goals	53	46.087%
Average annual investment returns	17	14.783%
Total funds for retirement	27	23.478%
Summary:	115	

3 | My greatest concern about my personal finances is:

Statistics diagram

0204060Answers

Numeric statistics

Question Options	Number of answers	Percent
Not having enough money to live comfortably in retirement	33	27.049%
A significant investment loss due to the economy	54	44.262%
Outliving my financial resources	22	18.033%
Unexpected expenses	13	10.656%
Summary:	122	

1 | You would recommend our services to family, friends, and colleagues.

Statistics diagram

050100150Answers

Numeric statistics

Question Options	Number of answers	Percent
Yes	116	95.082%
No	1	0.8197%
Not sure	5	4.0984%
Summary:	122	