

CLIENT SURVEY RESULTS

17th June 2024

We are thrilled to share the results of our recent client survey. Your feedback is invaluable in helping us evaluate and enhance our services.

Here at Yovich & Co, we strive to offer and maintain the highest level of customer service to our clients. We are extremely encouraged by the survey feedback and take great heart in hearing that our adviser team are hitting the right marks. Central to providing such good service is having a genuine care and understanding of our clients' financial needs, goals and the services they require, along with promoting open dialogue to constructively address concerns and provide education around complex concepts. With extensive financial knowledge, our advisors instil confidence and provide reliable guidance on investment decisions to achieve positive long-term investment outcomes.

General Service Feedback

1. Communication and Frequency

Average Rating: 4.4 out of 5

We are pleased to see a high level of satisfaction with our communication practices. To further improve, we have welcomed two new financial advisers to our team. Additionally, we have now transitioned our monthly market updates to weekly to keep you informed for regularly.

2. Investment Meetings

Average Rating: 4.3 out of 5

Your feedback indicates that our clients are satisfied with the frequency of our investment meetings. Please feel free to reach out should you need to meet with your financial adviser to review your investments and strategy, and we will accommodate your request as soon as possible.

3. Technology Solutions

Average Rating: 4.2 out of 5

We understand the importance of robust technology solutions for communication and account management. To enhance your experience, we have partnered with NZX Wealth Technologies as our custodial platform. As part of this platform, we can provide you with client portal access so you can keep track of your portfolio.

Please reach out if you would like to have portal access set up on your account. (Applicable to Personalised Portfolio Management and Administration clients).

4. Overall Satisfaction

Average Rating: 4.4 out of 5

We are delighted with your positive overall satisfaction rating. We are committed to maintaining and improving the high standards of service that you expect.

Survey Participation

Thank you again to everyone who participated in the survey. Your insights are crucial for our continuous improvement.

Survey Draw Winner

Congratulations to Julie, the winner of the \$150 voucher for Split Bar and Restaurant!

We appreciate your ongoing support and look forward to serving you even better in the future. If you have any further feedback or questions, please do not hesitate to contact us.