

# Client Feedback

Our client surveys enable us to not only measure our own performance year-on-year, but also compare our results against other firms across the UK. We value the responses we receive from our clients, and will always look for ways to improve.

**Our most recent survey was completed in October 2021, here are the results...**



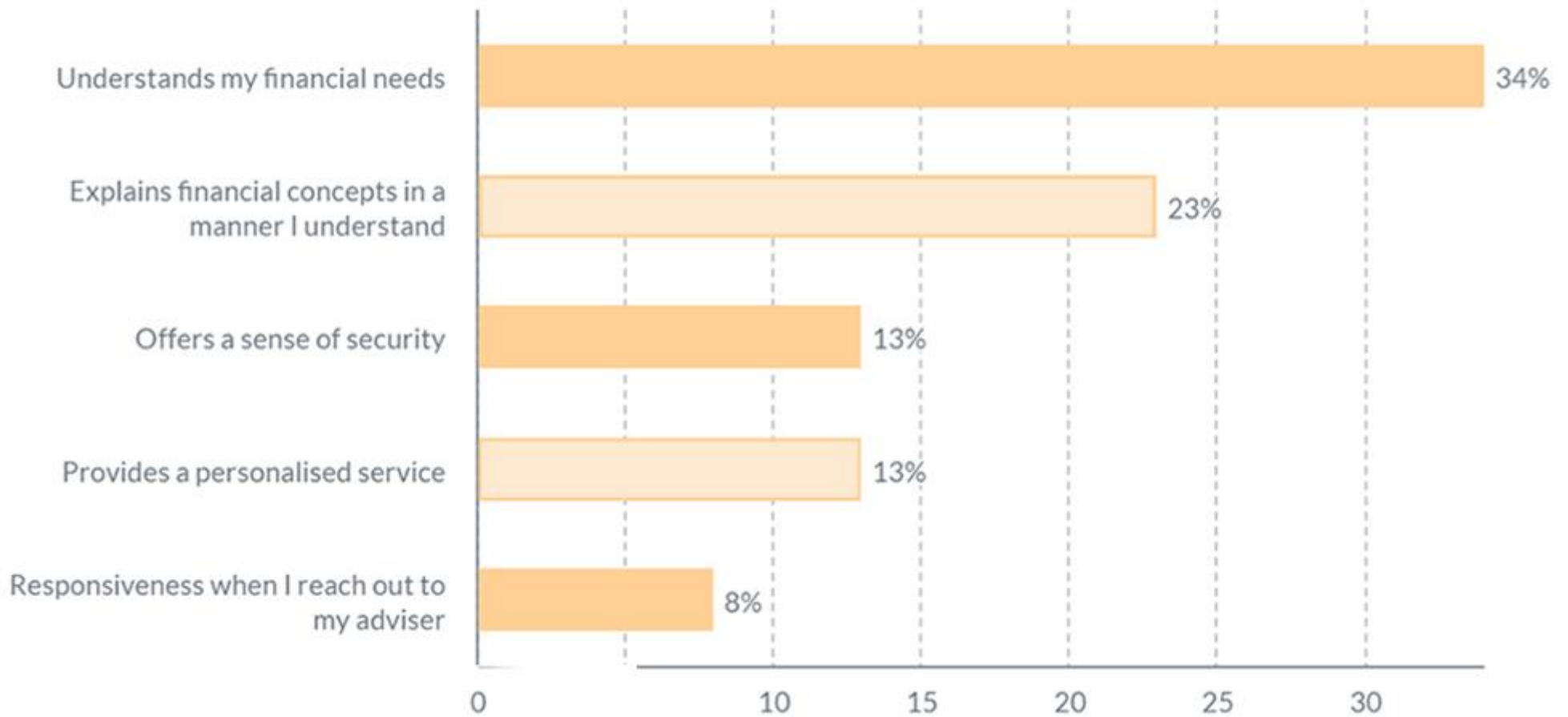
43% response rate: 420 Invited, 182 total responses.

**80%** of our clients would recommend AAB Wealth



Our clients are most satisfied with the personalised service we provide

## The top five attributes our clients value most are:



**42%** of our clients think advisers having...

**“...experiences with clients like me”**

is the most important attribute in their adviser relationship

When asked **'What does Peace of mind mean to you?'**...

**60%**

... of clients define it as **'Not running out of money'**

**41%** of clients said the primary reason they selected their adviser was because...

**“They understood my goals and needs”**

of our clients said they measure the value received from their adviser based on their **‘sense of security’**

**31%**

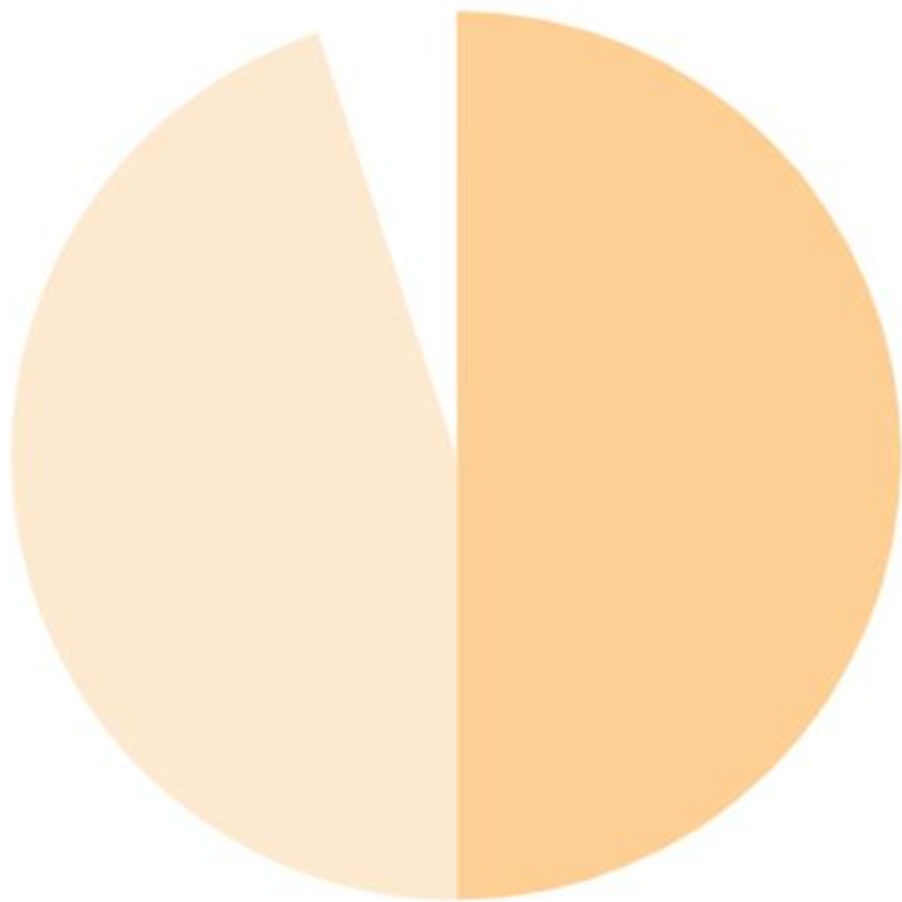
**58%** of clients have referred  
AAB Wealth because...

**“I believe my adviser could help  
solve a problem”**

They also said that they were recommended  
by a friend, colleague or family member



of clients like to  
meet their advisor  
at least once over a  
12 month period



**We asked clients if they expect their assets to remain under their adviser's care after they have been passed to their heirs.**

50% said yes and 45% said they weren't sure



**52%**  
of our clients prefer to meet their adviser for in-person meetings

**Our clients view...**



**...and Financial Planning as the most important services to them**



Some more feedback our clients chose to share with our advisers:



A word cloud of client feedback in shades of orange and yellow. The words are arranged in a roughly circular shape. The most prominent words are 'good', 'support', 'professional', 'great', 'value', 'thank', 'service', 'enjoy', 'advice', 'trust', 'team', 'friend', 'personal', 'job', 'approachable', and 'feel'. The background features large, overlapping orange circles.

enjoy  
advice  
approachable  
thank service  
value feel great  
team friend good  
trust job  
professional  
support  
personal

Visit the **client feedback** section of our website to find out more.