



## CLIENT SURVEY RESULTS 2008

*The Planning Center is an independent, fee-only financial planning firm. TPC will serve as your guide by integrating your personal values and beliefs into your financial plan.*

**The Planning  Center**  
DISCOVERING THE WEALTH WITHIN

## ASKING AND LISTENING

A successful financial planning firm depends on a strong bond between client and advisor. Continually adding value to this relationship is at the core of The Planning Center (TPC) philosophy. In order to assess The Planning Center's current relationships with clients, a survey was conducted by an independent consulting firm in early 2008.

### Getting Client's Feedback.

This is a summary of the findings of the client survey conducted by Advisor Impact in partnership with Moss Adams in 2008. The Client Survey measured overall client satisfaction, specific areas within the practice, as well as areas of client interest that could be developed or enhanced.

### Impressive Findings.

The Planning Center met or exceeded industry averages in every category measured. Beginning with the extremely high response rate, to the 99% satisfaction rating, followed by 99% of clients stating that they would recommend TPC to family, friends and colleagues, we are excited by the results and opportunities for future growth.



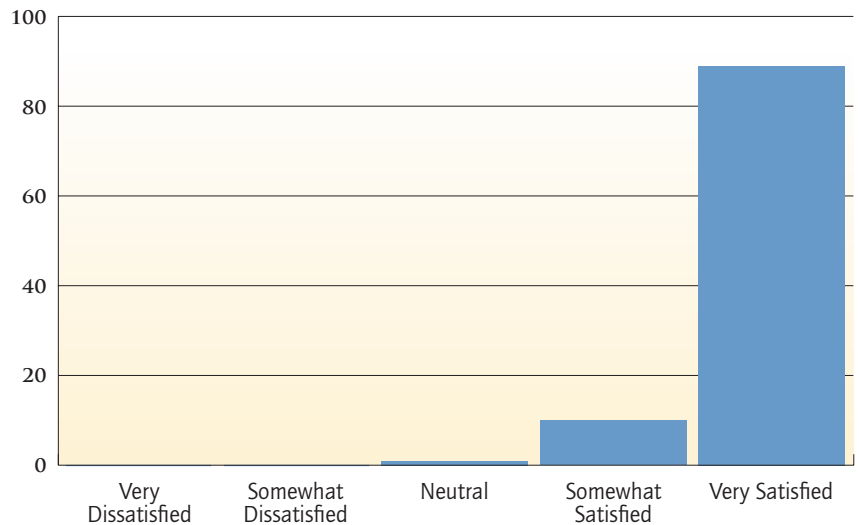
“We’re proud that not only are people satisfied with the service and planning approach at TPC but that 99% of our clients would refer people to our firm. These results are not possible without continually listening to our clients and our personal approach to meeting our client’s needs. This customer feedback will be critical as we measure our success and plan for the future.”

Marty Kurtz, Founder/President  
The Planning Center

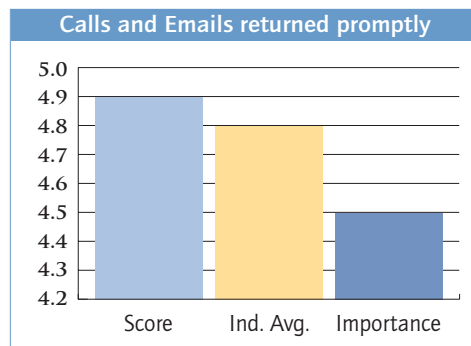
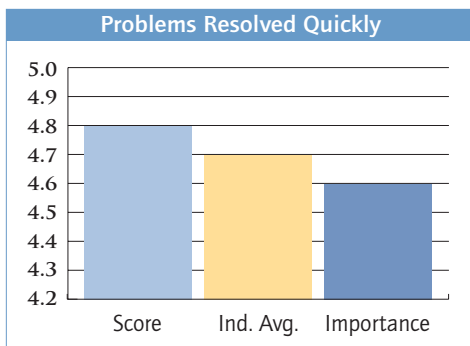
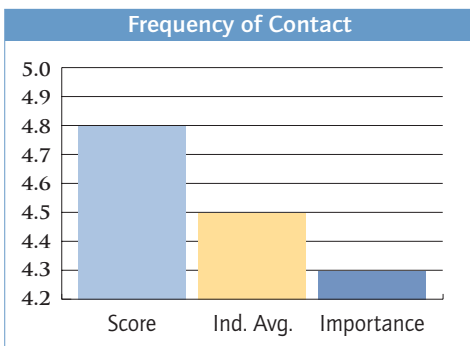
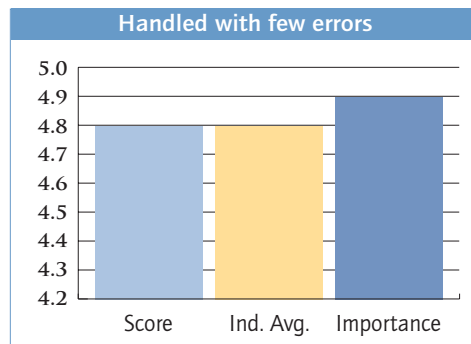
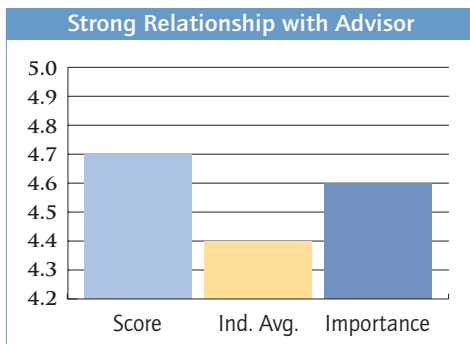
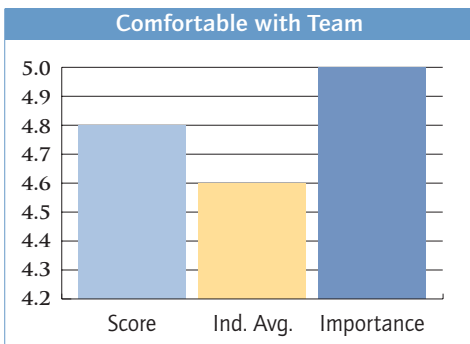
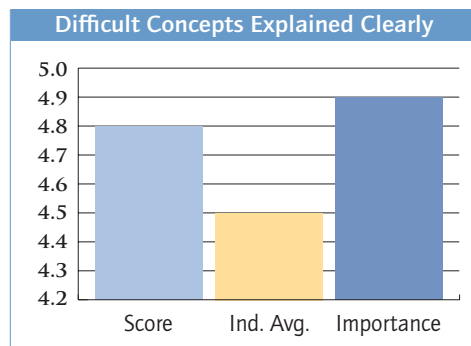
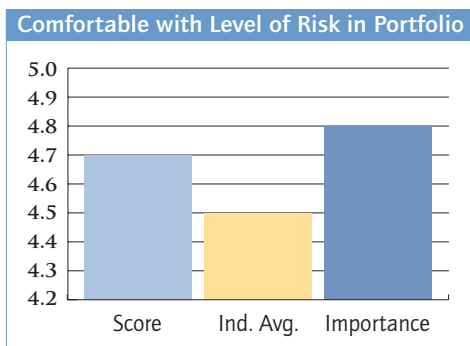
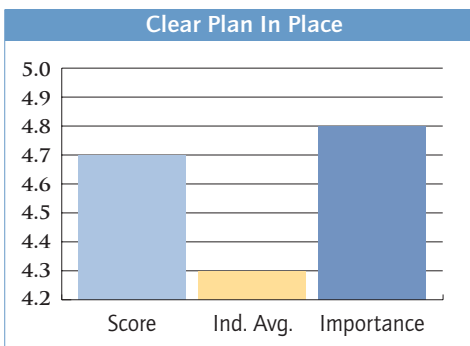
## THE RESULTS

99% of our clients are satisfied with the overall relationship they have with TPC. Clients were asked questions regarding several aspects within the practice, such as frequency of contact, promptness of returned calls, and comfort with the level of risk in their portfolios. TPC consistently scored well in all of these areas. In the areas most important to clients, TPC exceeded industry standards.

### CLIENT SATISFACTION



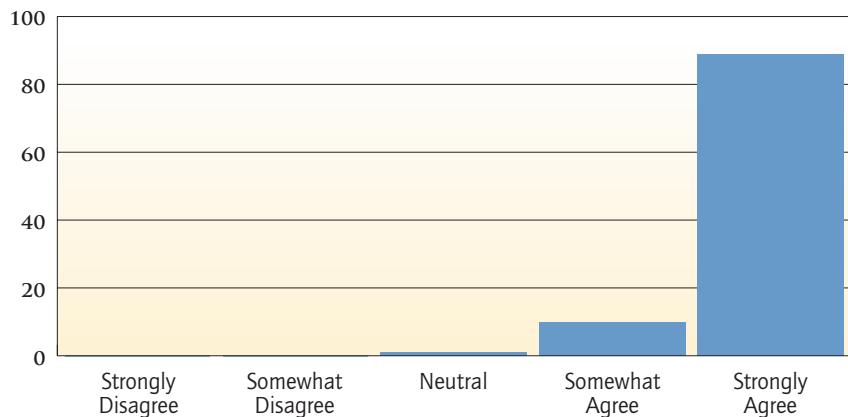
# RELATIONSHIP FACTORS OUR CLIENTS RATED MOST IMPORTANT



## REFERRALS

*Referrals are the strongest vote of confidence a client can give a firm. Almost 90% of our clients feel strongly that they would recommend, or have recommended TPC to their family, friends and colleagues. This remains the best way for TPC to continue developing new relationships into the future. By working with multiple generations of the same family, we help develop a unified purpose to the family wealth while helping the individual members reach for their own unique goals. In addition, by collaborating with other professionals, such as accountants and attorneys, we serve as a guide in implementing sophisticated and complex financial plans.*

### CLIENT REFERRALS



## RESPONDING

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The Planning Center will continue to respond to our client's needs and their lifestyles. We constantly look for new ways to educate our clients; create environments for discussions on values, money and defining goals; and provide the information and tools needed for our clients to build fulfilling and rewarding lives.

### Enriching Lives.

TPC is enhanced every day by the people we have met and the discussions we are able to have with our clients. We consider these relationships not just about developing a financial plan but defining a life plan. The dialogues that occur during our planning process evolve into a process of modifying strategies and implementation techniques as new goals are uncovered and changes occur throughout a client's life.

### Live the Life You've Earned.

The Planning Center is an independent, fee-only financial planning firm. TPC will serve as your guide by integrating your personal values and beliefs into your financial plan. Our proprietary approach to financial life planning builds a personal plan tailored to your lifestyle. Give yourself the freedom to see the future you want to have, and discover the wealth within your life by working with the team at The Planning Center.

### Client Top Interests

1. Tax Planning
2. Trust Services
3. Family Wealth Planning
4. Estate Planning

Where do we go from here? We are listening to our clients' needs. Where do they want or need advice and support? These are the top 4 areas our client's mentioned as areas of interest to them. We have begun to explore how these areas fit into the TPC process and to look at ways that we can help facilitate complex planning strategies such as these.

We continually strive to be more than we are today, by finding ways to help our clients grow and to challenge our personal growth and expertise. Working with TPC is about the journey and discovering the wealth within each individual's life.

Call The Planning Center today.

