



# MORRINSON WEALTH MANAGEMENT LLP

Senior Partner Practice of St. James's Place Wealth Management



ST. JAMES'S PLACE  
WEALTH MANAGEMENT

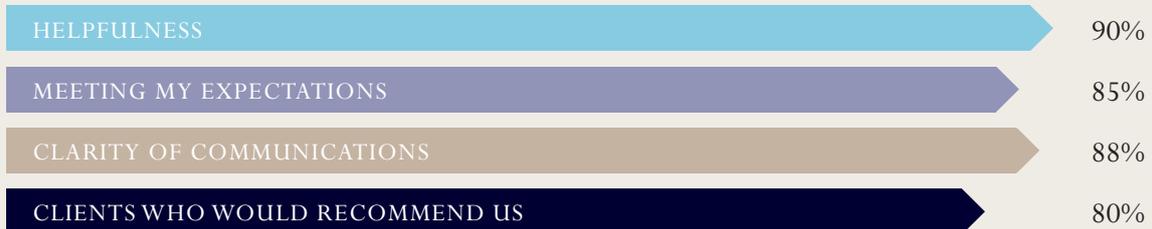
## 2018 CLIENT SURVEY RESULTS

We are proud of the service we provide to our clients. The results of our 2018 survey highlight the quality of the service and overall client satisfaction. Following a positive response to the survey, we have produced this short summary of the key messages.

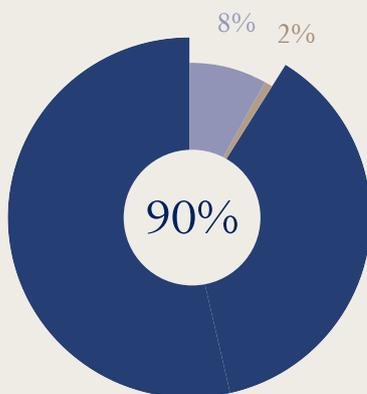


OF OUR CLIENTS RATED THEIR SATISFACTION WITH OUR OVERALL SERVICE AS EITHER 'VERY SATISFIED' OR 'QUITE SATISFIED'.

### PERCENTAGE OF OUR CLIENTS RATING THEIR SATISFACTION LEVELS FOR OUR SERVICES AS EITHER 'VERY SATISFIED' OR 'SATISFIED'



Number of respondents: 156



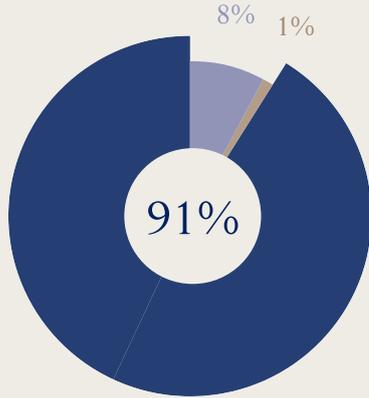
### RELEVANCE OF ADVICE

90% of our clients are either 'very satisfied' or 'satisfied' with the relevance of the advice they receive. We always strive to ensure that the advice we give is topical and relevant to each individual's requirements. We feel that this result reflects our philosophy that every client's situation is completely unique.

- Very satisfied/ Satisfied
- Indifferent
- Dissatisfied

Number of respondents: 156

## UNDERSTANDING CLIENTS' NEEDS



91% of our clients are either 'very satisfied' or 'satisfied' that we understand their specific needs. We always strive to ensure that the advice we provide is topical and relevant to each individual's requirements. We feel that this result reflects our philosophy that every client's situation is completely unique.

- Very satisfied/ Satisfied
- Indifferent
- Dissatisfied

Number of respondents: 156

## CLIENT TESTIMONIALS

*"I have always been impressed by the level of detail that my Wealth Manager goes into, taking the time to really understand my individual needs, doing research and coming up with best proposals for my investments. When I have questions, the response always comes back in a very timely manner, and even simple queries are treated with respect."*

*"I have been very impressed by the level of knowledge and contact from my wealth manager and I feel as though my assets are in good hands at Morrinson Wealth Management. I look forward to a productive relationship over the coming years."*

*"St. James's Place competent advice and assistance has been pivotal in helping me. I was strongly comforted by their knowledge all along the process."*

*"My Financial Adviser is an excellent professional who understands my needs and requirements and is someone who I have already recommended to my partner. He has a wealth of knowledge and advice and is also a very polite and friendly man who I am very happy to entrust my finances with."*

*"We've been very impressed with the service to date. We've built a hugely improved understanding of our own financial affairs and projections for the future and been guided through some important decisions to reduce risk and increase growth making us much more comfortable we have a plan for the future and much improved financial certainty."*

*"The service provided by St. James's Place has been very professional and delivered in a friendly way, strongly recommend their services."*

## MORRINSON WEALTH MANAGEMENT LLP

Senior Partner Practice of St. James's Place Wealth Management

Tel: 020 7516 5700 Email: [morrinsonwealth@sjpp.co.uk](mailto:morrinsonwealth@sjpp.co.uk) Web: [www.morrinsonwealth.co.uk](http://www.morrinsonwealth.co.uk)

Address: St. James's Place 40 Bank Street Canary Wharf E14 5NR