Client Survey

SUMMARY HIGHLIGHTS

CLIENT SATISFACTION

Clients of the Burton Team scored high on their satisfaction rating.

97% satisfied

Clients also felt the Burton Team ...

are trustworthy Advisors.	created a better financial future.	helped them in reaching their financial goals.
4.9 out of 5	**4.7** out of 5	**4.5** out of 5

RATED THEIR ADVISOR AS MEETING OR EXCEEDING EXPECTATIONS

CLIENT INTERACTIONS

Our clients prefer these forms of communication

3.8	3.0	2.7
FACE-TO-FACE*	TELEPHONE*	NEWSLETTER

*for review discussions

On average our clients would like 2.2 face-to-face meetings per year.

73% of clients are comfortable using email as their primary written communication channel.

CLIENT REFERRALS

92% of clients are likely to provide referrals.

I would recommend my financial advisor to family and friends.

CLIENT KNOWLEDGE

Clients would like to know more about these topics:

1. Tax planning strategies
2. Planning for your income needs in retirement
3. Retirement planning
4. Estate planning
5. Family wealth counselling
6. Assistance with purchase of major assets
7. Life insurance**

CONTACT THE BURTON TEAM TODAY TO DISCUSS YOUR FINANCIAL FUTURE

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BURTON TEAM

Investment Planning Counsel® IPC INVESTMENT CORPORATION

Investment Planning Counsel® IPC SECURITIES CORPORATION

CIPF Canadian Investor Protection Fund MEMBER