



Survey Says...

*Dan J. Rinzema, CFA, CFP[®]
Chief Client Officer*

Continuous improvement is one of Greenleaf Trust's core values - it is a pillar of our culture and has become part of our DNA. Every tangible improvement we have made on behalf of our clients stems from a disciplined review of our practices. As we look for opportunities to serve our clients better, we begin by listening to those that matter most - our clients.

Our annual personal trust and wealth management client satisfaction survey is designed to gauge Greenleaf Trust's collective efforts from our clients' perspective. We not only want to know if we are delivering on our promises, but we also crave candid feedback on ways in which we can better serve our clients. Analyzing the results helps us more closely align the voice of our client with our daily impact and better understand how our clients feel about Greenleaf Trust's personalized service and customized solutions. The aim is to listen to client comments and suggestions so that we can enhance the services provided on their behalf. Simply put: when our clients speak, we listen.

As an example, looking back at recent years' survey results, it was revealed that the format of our investment performance reporting could be improved to better meet the individual needs of our clients as only 84% of respondents found the report meaningful in our 2013 year-end survey. Given this feedback, we made it our goal to provide more customized, relevant and meaningful performance reporting. We heard what our clients wanted and responded with updated performance reports tailored to their specific needs. As a result, satisfaction with our quarterly investment performance report format jumped to 97% the following year and sits at 100% as of 2018's survey. Similarly, the 2014 survey revealed that many clients wanted consolidation of monthly

statement packaging. We listened and responded quickly by consolidating statement packaging starting the following January and the corresponding statement satisfaction score registered at 98%. Similarly, themes from write-in comments from 2015 and 2016 centered around our investment platform and online client portal. We took those comments to heart and

not only enhanced our investment offering with 97% of clients now reporting that we are successful in meeting their investment needs, but we also rolled out our revolutionary online portal called [mywealth](#) by Greenleaf Trust, which allows our clients to view their holistic wealth through a safe and secure personal financial website, bringing their entire financial picture together in one place like never before. Last year's survey revealed a desire for improved tax reporting. We recognized this as a shortcoming and put a plan in place to improve. This included seeking input from many of our clients' CPAs to better understand expectations and formatting preferences, re-engineering many of our processes for more timely delivery, initiating additional

quality assurance checks throughout the year to continuously scrub the data, and adding new talent to the team with specialized tax expertise and a deep knowledge of our systems' inner workings. As a result of these efforts, satisfaction jumped to 98% in the 2018 survey results.

When sending the 2018 survey, we again asked for candid responses. Our clients answered in kind with survey participation not only hitting record levels, but also registering at more than triple the industry average. Thank you to those that took the time to respond - we truly value your feedback. The following is a summary of what we heard you, our clients, say:

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2018 Client Satisfaction Survey Results:
Personal Trust & Wealth Management

100% find their client centric team members to be easily accessible

99% feel their questions and concerns are answered in a prompt and satisfactory manner

98% are satisfied with the frequency of contact

99% feel as though they are treated as a very important client

100% believe we listen to and understand their unique goals and objectives

99% believe their accounts are tailored to meet their unique financial goals and objectives

97% believe we are successful in meeting their investment needs

Satisfaction scores with our account statements, performance reports, newsletters and seminars uniformly exceeded 99%.

While we are pleased with the generally high marks received, we recognize there is always room for improvement. So in order to enhance the value of our relationship with our clients, and to achieve our standing goal of 100% client satisfaction on all fronts, we will intently focus on the specific suggestions and comments received. Two initiatives already under way as a result of the recent survey include adding additional functionality to our relatively new online client portal, wealth by Greenleaf Trust, as well as increasing the frequency of economic and financial market updates from our in-house research team.

Again, thank you to all of our clients that took the time to respond to our recent client satisfaction survey. The overall response rate was gratifyingly high and the comments overwhelmingly positive. My colleagues and I are always receptive to your suggestions, and we hope you will never hesitate to share your candid opinions with us - when you speak, we listen. Thank you for allowing Greenleaf Trust the continued privilege of serving on your behalf. 

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