

# Personal Trust & Wealth Management

## 2021 Client Satisfaction Survey Results

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Just when we thought 2021 couldn't throw any more surprises our way, clients of Greenleaf Trust responded in record numbers to our annual client satisfaction survey.

To sum it up, our client centric service model and holistic approach to managing wealth appear to be highly effective and well regarded. Two proof points: 100% of respondents said we listen to them and understand their unique objectives; 99% said we successfully meet their investment needs.

With the new year ahead, we're already back at it, striving to deliver ever better service and value to our clients. We would welcome the privilege of serving you, too.

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99.3% find their client centric team members to be easily accessible

99.3% feel their questions and concerns are answered in a prompt and satisfactory manner

99.3% are satisfied with the frequency of contact

99.7% feel as though they are treated as a very important client

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

100% believe their accounts are tailored to meet their unique financial goals and objectives

99% believe we are successful in meeting their investment needs