



Personal Trust & Wealth Management 2024 Client Satisfaction Survey Results

In a world of change, one thing remains certain: our commitment to providing exceptional client service. Truly understanding your needs is essential to helping you reach your goals, and we're proud to see this reflected in our recent survey results.

365 days a year, 7 days a week we are here for our clients, striving to deliver ever-better service and value. We would welcome the privilege of serving you, as well.



100%

ACCESSIBILITY



99%

QUESTIONS & CONCERNS
ANSWERED IN A PROMPT &
SATISFACTORY MANNER



100%

FREQUENCY OF CONTACT



99%

TREATED AS AN
IMPORTANT CLIENT



100%

LISTENS TO & UNDERSTANDS
GOALS & OBJECTIVES



100%

ACCOUNTS TAILORED TO
GOALS & OBJECTIVES



99%

MEETING INVESTMENT NEEDS



99%

STATEMENTS, PERFORMANCE
REPORTS AND TAX INFORMATION



100%

INVESTMENT AND WEALTH
MANAGEMENT SEMINARS