

December Client Newsletter

November 30, 2011

Almost 12 months ago we surveyed our clients on a number of topics. These ranged from your satisfaction with our current service offerings and responsiveness, to changes you might like to see in the future. Over the course of 2011 we have implemented a few of your requests and as we enter 2012 we hope to address even more. What follows is a summary of our progress.

What did you ask for?

- Enhanced reports - charts, performance of specific investments, comparisons against other relevant benchmarks and electronic statements.
- Investment information - research used for portfolio decisions and more in-depth coverage of current economic/market events.

What did we do?

During 2011 we experimented with a new module on our current reporting software with the goal of including charts and graphs to further illustrate performance. We also discussed adding narrative to better tie our traditional investment data and any charts/graphs we elect to add, to current market and economic trends. We will continue to look for new and better ways to illustrate report data but for now we will rely on the current format.

For two years running we have prepared and delivered monthly newsletters on investing, planning and relevant world political and economic events. These have been well received and continue to provide the opportunity to address timely topics of interest. As a reminder, we maintain 2 years of past newsletters on our website. We also plan to address more planning related topics in 2012 in direct response to your feedback expressing interest in tax, estate and retirement planning.

In direct response to your request for more in-depth information, we added a quarterly economic overview in 2011. This was done in a webinar format to allow direct interaction through dialogue and Q & A. Participation roughly doubled between the first and second webinar and we are excited about the possibilities this form of communication will provide in future years.

At this time we have no immediate plans to offer electronic statements. We recognize these are more environmentally friendly and offer advantages when saving information on your computer. However, before making this a standard service, we want to explore the many ways to deliver them securely. Our more immediate focus is to enhance report content which ranked as a greater priority in the survey results.

We think asking for feedback is critical in focusing our attention and resources in areas you have expressed as important. We do not have any plans to distribute a formal survey in 2012 but want to encourage you to let us know what you believe will improve our services. As always, we appreciate the trust you place in us to help you with your financial decisions and we hope you have a safe and happy holiday season.