

Client Survey

SUMMARY HIGHLIGHTS



CLIENT SATISFACTION

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



Clients also felt the Burton Team ...

are trustworthy Advisors.

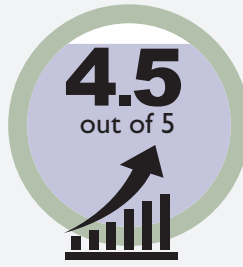


RATED THEIR ADVISOR AS MEETING OR EXCEEDING EXPECTATIONS

created a better financial future.



helped them in reaching their financial goals.



CLIENT INTERACTIONS

Our clients prefer these forms of communication



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.



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
29 West St. S., Orillia • 705-329-4466 • www.burtonfinancial.com

BURTON TEAM

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Canadian Investor Protection Fund
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