



## Meeting your individual investment objectives requires a high degree of investment expertise but also a superior level of client service. We asked our clients about their experience with JM Finn and were delighted to learn that we are succeeding in our goal.

Ever since our founder, John Mendl Finn, was granted his stockbroking licence in 1945, delivering exceptional service to our clients has been at the forefront of the firm's approach to wealth management.

We believe there are three key ingredients needed to become a valued and trusted manager of an individual's personal wealth: a willingness to develop a personal relationship with those who entrust their wealth to us, an ability to understand their investment needs and the capability to use all the resources at our disposal to try and meet those needs.

Today, with over 80 investment professionals looking after over £9bn of assets under management and advice on behalf of over 15,500 clients<sup>1</sup>, our business has continued to grow allowing us to maintain our belief that offering a personal service is what our clients expect. In a world where investors are increasingly put at arm's length from the decision making, we firmly believe that to offer a personal service, your main point of contact should be your investment manager.

### Don't just take our word for it

We surveyed a sample of our discretionary clients in 2019<sup>2</sup> who told us, when asked what they were particularly satisfied with, that the personal service was the main driver of satisfaction.



**A very friendly and open relationship with regular communications and updates.**

*Client of JM Finn*

We also explored our clients' general perceptions of the firm and the satisfaction with the level of service they receive, which resulted in feedback which underlines the success of our approach to offering wealth management services on an individual basis:

- 98% have trust and confidence in the individual who acts as their investment manager
- 96% have trust and confidence in JM Finn as a firm
- 93% are satisfied with the overall experience from JM Finn (of which 77% were very satisfied)

<sup>1</sup> All data as at 31st March 2019

<sup>2</sup> An independent survey of 2,094 clients conducted in March 2019 by Savanta

## The likelihood of a recommendation

There is no better testament of success than a recommendation. To recommend a brand, a service or an individual it goes without saying that you trust them and are prepared to possibly put your own reputation on the line. To measure this we calculate a Net Promoter Score (NPS) which determines the likelihood that clients will recommend JM Finn. With an NPS of 70, JM Finn far outstrips the industry average and some of our leading competitors something that we are incredibly proud of.



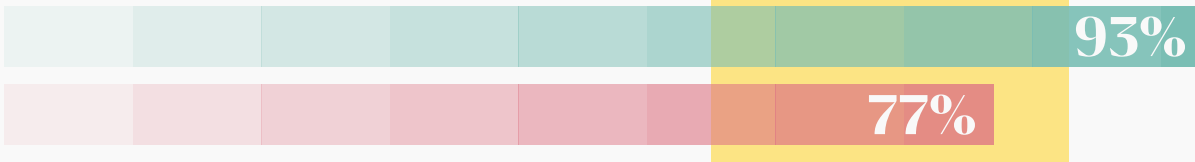
**It has been a breath of fresh air to talk to someone who understands the markets and provides very sensible independent advice. I understand the processes and thinking behind the discretionary decisions made on my behalf and feel part of the process.**

*Client of JM Finn*

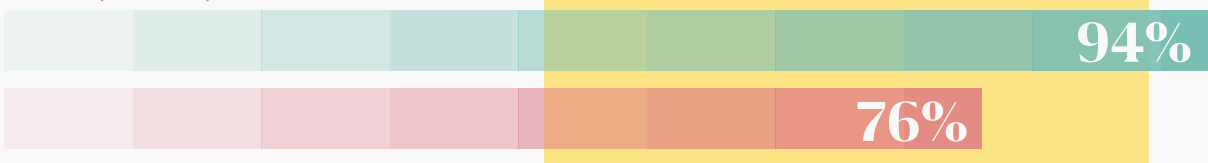
## JM Finn key performance indicators versus the market<sup>2</sup>



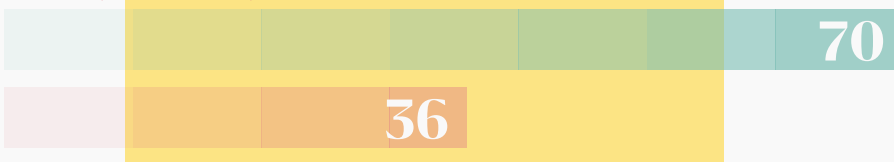
**Overall satisfaction**  
(8-10/10)



**Investment manager satisfaction**  
(8-10/10)



**NPS**  
(-100 to 100)



■ JM Finn<sup>2</sup>
■ Industry average<sup>3</sup>
■ Industry range<sup>3</sup>

<sup>2</sup> An independent survey of 2,094 clients conducted in March 2019 by Savanta

<sup>3</sup> Savanta; includes a selection of investment managers, wealth managers and private banks. Data gathered 2015-2019

## Trust



# 98%

have trust and confidence in the individual who acts as their investment manager

A successful investment management relationship requires a high degree of trust and confidence in your investment manager. We believe trust is earned over time and consists of a varying degree of attributes including, transparency, accountability, frequent communication and a consistent approach to the relationship.

## Communication



# 95%

are satisfied with the communication they receive from JM Finn

A successful discretionary relationship is often dependent on good communication. Our personalised service is built on the foundation of regular communication and an understanding of our clients' investment requirements.

We look to provide a more traditional level of face to face communication combined with the convenience of 24/7 access to your investment portfolios via your account on our secure website.

## Confidence



# 96%

have trust and confidence in JM Finn as a firm

In addition to a high degree of trust and confidence in the individual, a level of comfort about the firm they are employed by is important. Knowing that the firm can offer the appropriate resources and security, for example, can be instrumental in a successful client/ investment manager relationship.

## Referrals



# 70

JM Finn's NPS in 2019 which improved from 59 in 2015

JM Finn has grown consistently over the years thanks to word of mouth referrals from existing clients. With no greater testament to the success of a company than its existing clients' willingness to recommend them, we tested the likelihood of referrals by using a net promoter score which measures the willingness and likelihood of clients to recommend the firm to others.

## Overall experience



# 93%

are satisfied with the overall experience from JM Finn (of which 77% were very satisfied)

## Comprehensive Wealth Management

Identifying your investment goals is a good place to start when looking to invest. With a wealth management service that combines both Discretionary Portfolio Management and Wealth Planning, JM Finn can offer you peace of mind in knowing your financial affairs are in good hands.

Please note that the value of portfolios can fall as well as rise and past performance should not be seen as an indication of future performance.



To learn more about how JM Finn can help you, please visit [www.jmfinn.com](http://www.jmfinn.com)



**Genuine personal service is rare these days. Keep up the good work!**

*Client of JM Finn*



**I feel confident that my money is well looked after. Most importantly I know the people I speak to and trust them.**

*Client of JM Finn*



**Personal communication and online services are vastly superior to offerings from much larger firms.**

*Client of JM Finn*

Follow us on:



Registered Office:  
4 Coleman Street  
London, EC2R 5TA

020 7600 1660  
info@jmfinn.com  
www.jmfinn.com

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GA-CSE-4pp-01-0519