

# JM FINN

Investment | Wealth

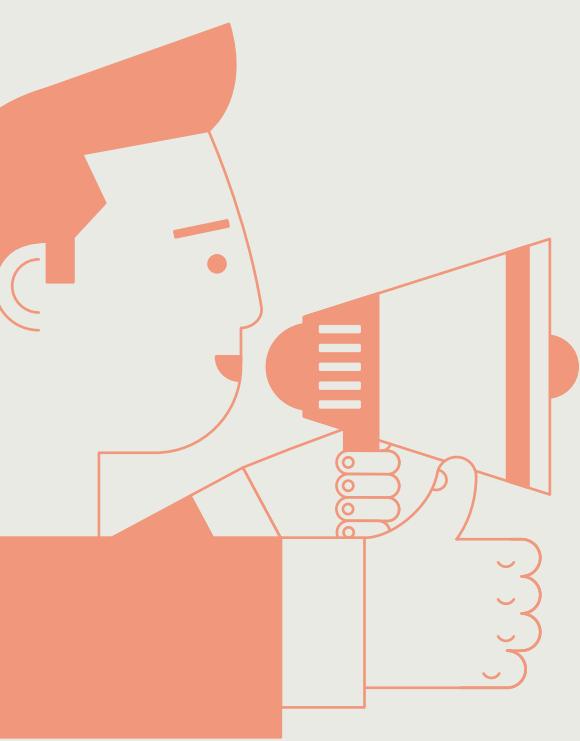
# Client service excellence

Meeting individual wealth challenges requires a high degree of 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.

In 2021, we conducted a client survey, in order to further understand how our clients feel we are meeting their goals and to benchmark ourselves versus our peers.

The benchmark is an industry-leading study which presents an overview of the client journey, as measured by key performance metrics of 10 participating firms who collectively manage in excess of £150bn in assets on behalf of private clients in the UK.





Would our clients refer JM Finn?

YES.

Net Promoter Score

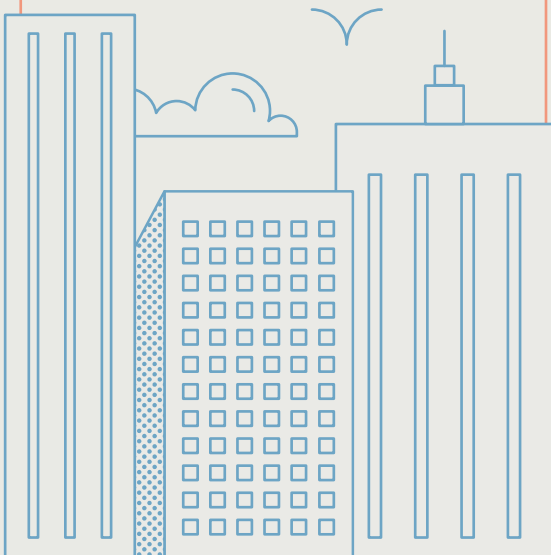
71

Benchmark

49

Our consistent growth over the years can be attributed to exceptionally high standards of client service, which drive client referrals via word of mouth.

This willingness to refer is measured by the NPS, or net promoter score, which is based on the overall satisfaction scores and which in turn is the result of our performance across a number of metrics.



## Investment manager satisfaction <sup>2</sup>

On a scale of 0-10 how satisfied are you with your investment manager at JM Finn?

9.3



Benchmark

8.8



## Overall satisfaction <sup>3</sup>

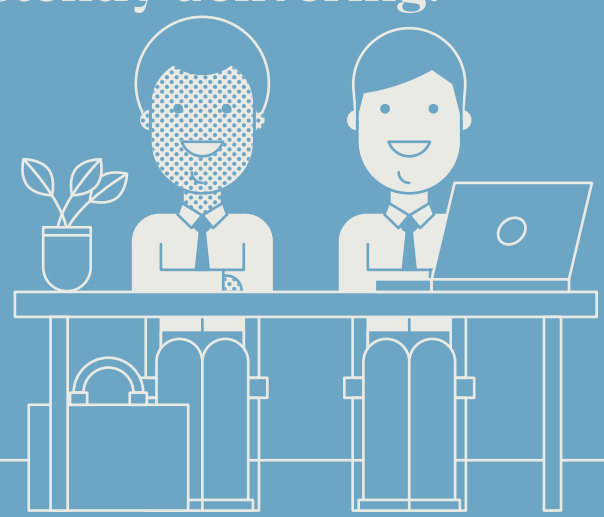
94%

Despite the challenges of the pandemic, overall client satisfaction with JM Finn has gone up since our last survey and tops the industry scores.



# Our Investment Managers are consistently delivering.

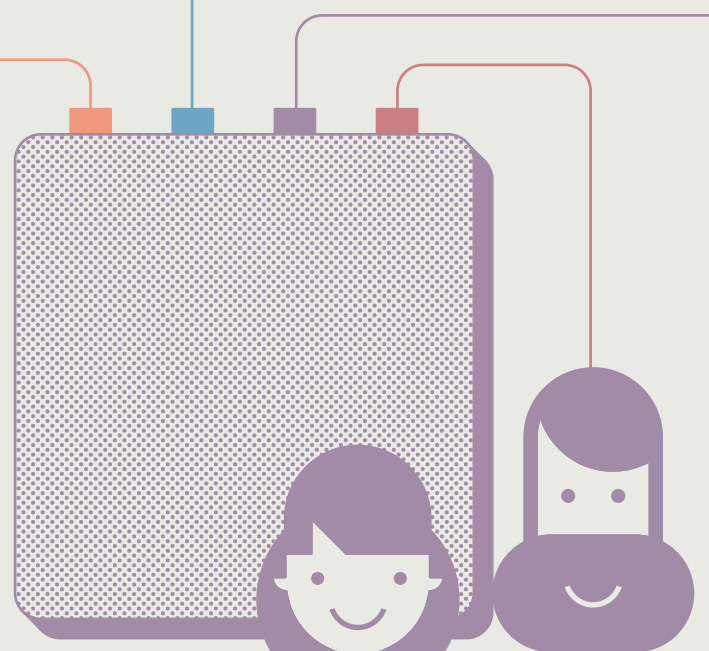
**95%**  
of our clients said that they were satisfied with their Investment Manager.



We are rated



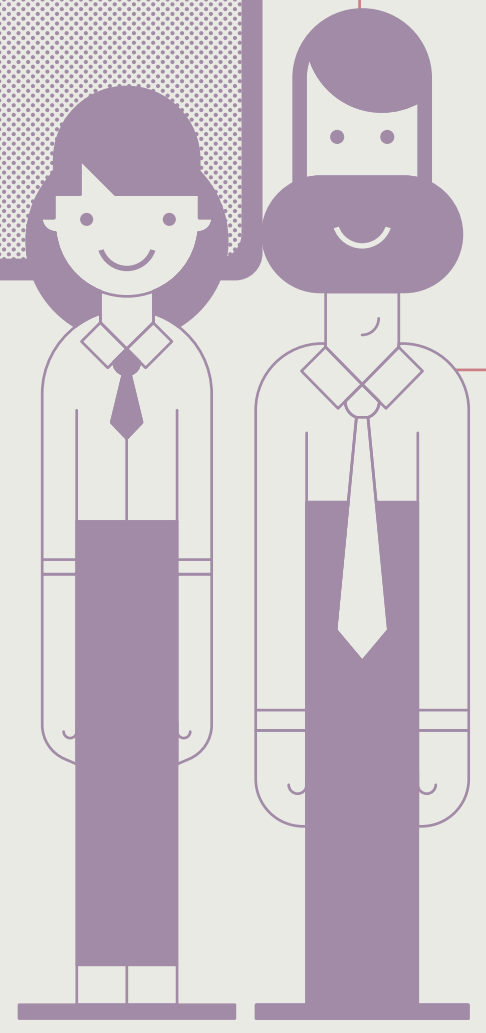
for client satisfaction against our peers



“

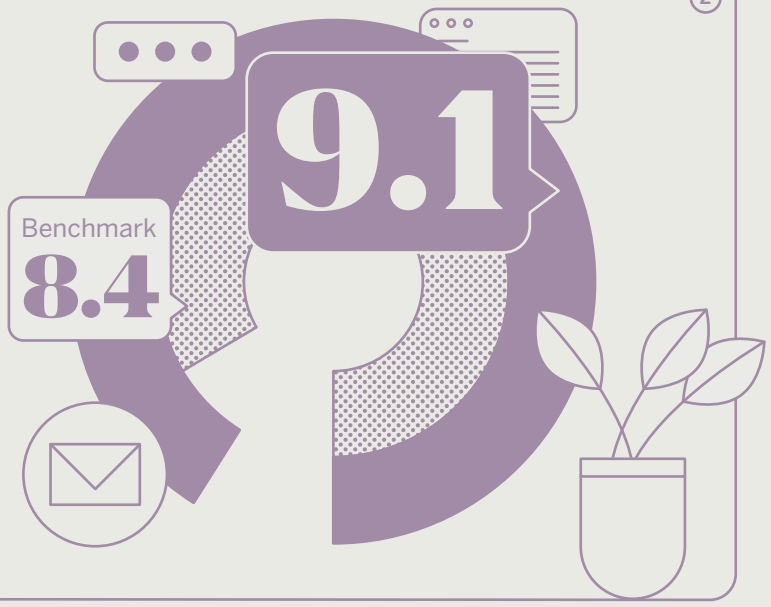
I value the personal touch and stability of the same person looking after my assets.

Client of JM Finn



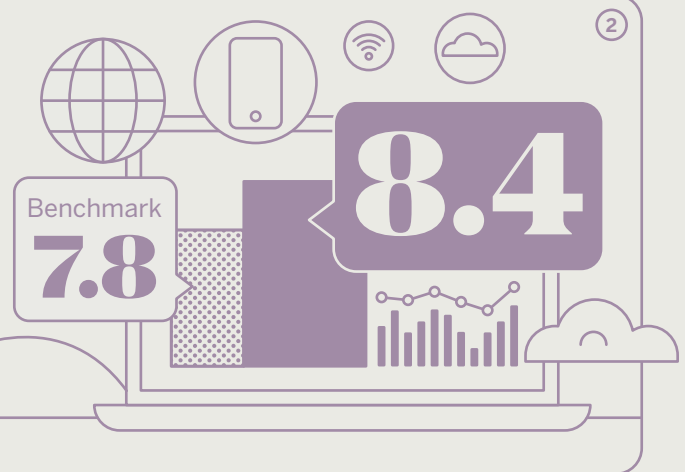
# Communications

On a scale of 0-10 JM Finn clients are more satisfied with the firm's overall communications than the competition.



# Digital

On a scale of 0-10 how satisfied are you with the overall digital capabilities provided by JM Finn?

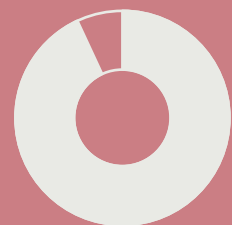


# When times were challenging, we maintained our high standards.

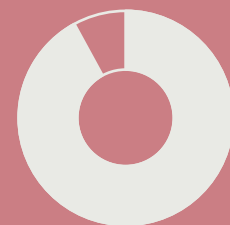
The pandemic was such an exceptional time we wanted to explore how clients felt we communicated with them, as these are the times when we need to prove our worth.



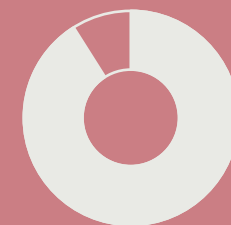
**94%**  
were satisfied with investment manager communication



**93%**  
satisfaction with the overall experience during the pandemic



**92%**  
of clients were satisfied with overall communication from the firm

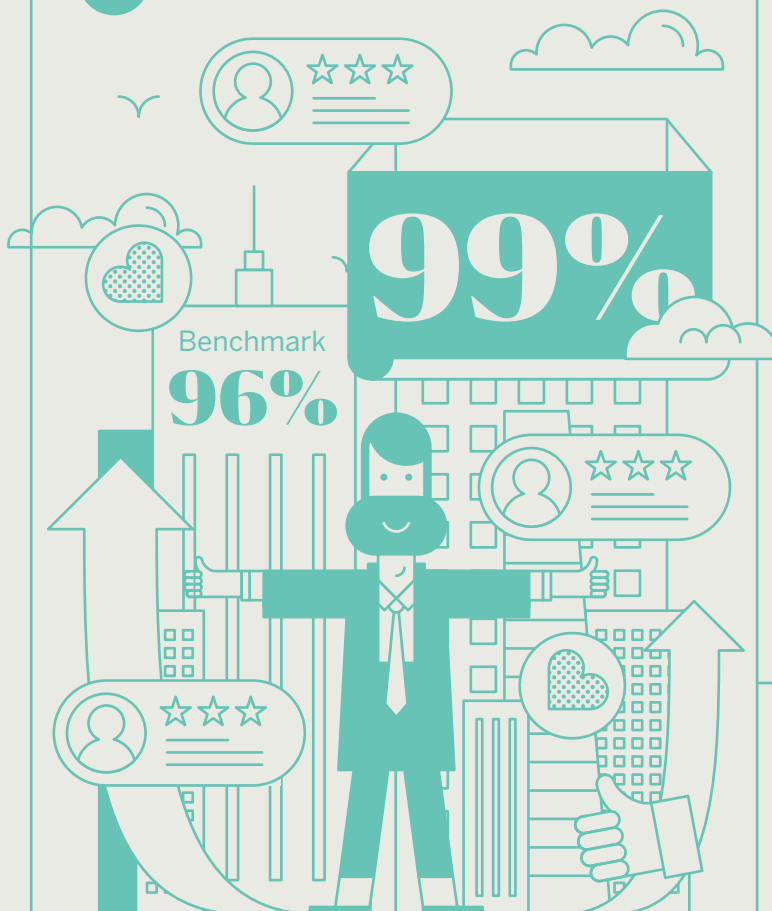


**91%**  
satisfaction with the frequency of the communications

# Our clients' overall satisfaction is key to success at JM Finn.

We asked all participants whether they feel that the range of products and services from JM Finn are:

- 1 In line with their risk tolerance
- 2 Meeting their individual needs and goals
- 3 Offer good value for money



- 1 Percentage of clients answering "yes" to the following questions: Do you feel that the range of products and services from JM Finn are: in line with your risk tolerance, meeting your individual needs and goals, offering good value for money
- 2 Average score out of 10
- 3 Percentage of respondents who selected 8-10 out of 10 where 10 is very satisfied
- 4 Percentage giving a score of 3 or higher on a scale from -5 to +5



Benchmark  
76%

86%

## Our brand perception is vital to continually deliver on our mission to put clients first.

Thinking about JM Finn, to what extent do you agree with the following statements?

JM Finn is...

- |                                 |  |
|---------------------------------|--|
| 1 Very trustworthy              | 4 Engaging                                     |
| 2 Transparent in its activities | 5 A confident brand prepared to do bold things |
| 3 Sensitive to my needs         | 6 A brand that's moving forward                |

The survey was an independent survey of 1,653 discretionary clients of JM Finn conducted in 2021 by Aon Client Insight.

Participating firms in the benchmark study were: abrdn, Brewin Dolphin, Brooks Macdonald, James Hambro & Partners, JM Finn, Kleinwort Hambros, Nedbank Private Wealth, Quilter Cheviot, 7IM and WH Ireland.

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