



Meeting your individual wealth challenges 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.

We surveyed a sample of our discretionary clients in 2021¹ who told us, when asked what they were particularly satisfied with, that the personal service was the main driver of satisfaction.



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

Client of JM Finn



Overall satisfaction
(8-10/10)



Investment manager satisfaction
(8-10/10)



Satisfaction with overall communications
(8-10/10)



Net Promoter Score (NPS)
(-100 to 100)



¹ An independent survey of 1,653 discretionary clients conducted in 2021 by Aon Client Insight

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.

**** ✓ **Strong performance across the board**

91%

Satisfaction with the wider team

86%

Brand Value score
Sentiment towards the brand³

100%

Client centricity Belief that the firm operates in the client's best interests²

Do you feel the services are⁴

In line with your risk tolerance **100%**

Meet your individual needs and goal **99%**

Offer good value for money **97%**

Satisfaction during the pandemic⁵

Communication with investment manager **94%**

Communication with JM Finn **92%**

Overall experience from JM Finn **90%**

Portfolio performance **90%**



To understand how our personal services might help you meet your specific wealth challenges, contact us on: **020 7600 1660**

² Percentage of respondents agreeing with Client Centricity statements

³ Percentage of respondents giving a score of 3 or higher across brand value statements

⁴ Average percentage of respondents answering Yes to the statements

⁵ Percentage of respondents giving a score of 8/10 or higher

The value of investments and the income from them can go down as well as up and investors may not get back the amount originally invested. Past performance is not a reliable guide to future returns.

Follow us on:



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