

Survey Results

Thank you for participating in our survey late in 2016. We wanted to share the results with you and let you know how we will use this information to provide more services in the future. Thank you for the 5 Star Ratings! We continue to strive for excellence.

Below are the results:

Goals, your highest priorities were in order: Retirement, Asset Management, Tax Reductions, Wealth Accumulation.

The Wealth Management Program overwhelmingly prefers our current fee-only asset managed program

Fees: The choice of **how to pay for investment and financial planning fees** was 98% for the current quarterly asset management fee that covers all meetings, updates and investing.

Additional Portfolio Types: Less than 1/3 of the responses were in favor of **additional portfolios** such as Social Responsible or All Equity. All other respondents voted for our current Asset Management program.

Portfolio Characteristics were fairly evenly valued across Tax Efficiency, Rebalancing, Research and Trading with the 2 highest results voting for Ongoing Monitoring and Portfolio Appropriateness.

Update Meetings: 95% of you take advantage of at least one **update meeting** per year citing **important topics** as Comprehensive Planning and Advice, Portfolio Review, Goal Setting, Education, Market Analysis and Investment Strategy.

Education: Most of you prefer to meet at the KFS offices, either individually with your planner or in a workshop setting.

Beneficial Services were In Depth Financial Planning and Portfolio Review (highest); Rewarding Planner Relationship, Ethics, Transparency and Objective Advice.

We are surprised that our **website** is under-utilized and we will strive to continue posting current content regularly. Don't forget the weekly market update is now under the Newsflash button on the Home Page.

Changes for the Future:

We have discontinued the Market Call in Hotline and are posting the Weekly Market Update on the Website and on Facebook. This way, the previous information is always available to you and you can forward the information to friends, like us on Facebook or even print your own copy.

We will continue the Quarterly Educational Workshops.

We are adding Ad Hoc Round Table Discussions for small gatherings at our offices during the year. If you have suggestions for topics and times, please let us know.

You are welcome to give us feedback and suggestions at any time through our email or phone system.

We will offer to meet with you twice a year if you would like, once for financial planning updates and once for portfolio review. If you still prefer a combined meeting that could take up to 1 ½ hours, we will continue to offer those as well.

We will contact you in advance of your appointment time as a reminder unless you instruct us not to.

We will offer additional portfolios for those who qualify, such as All Equity or Socially Responsible.

We will offer an automated version of our Asset Allocation Program at a lower cost for Household's with less than \$100,000 of investible assets. Please let your family and friends know.

We will provide an additional CFP besides Pat for every client relationship. This allows you the ultimate in customer service and planning advice regardless of our busy schedules.

We will continue to look for opportunities to incorporate Charitable giving into our Client Events. Thank you for your donations of Coats for Colorado and School Supplies over the years. Our focus in the near future will be a collaboration with the Alzheimer's Association in honor of the many families we serve who have been affected by this disease.