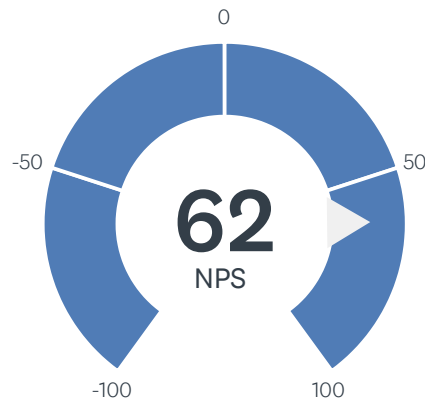


Q1 How likely is it that you would recommend Moneyworks NZ Ltd to a friend or colleague?

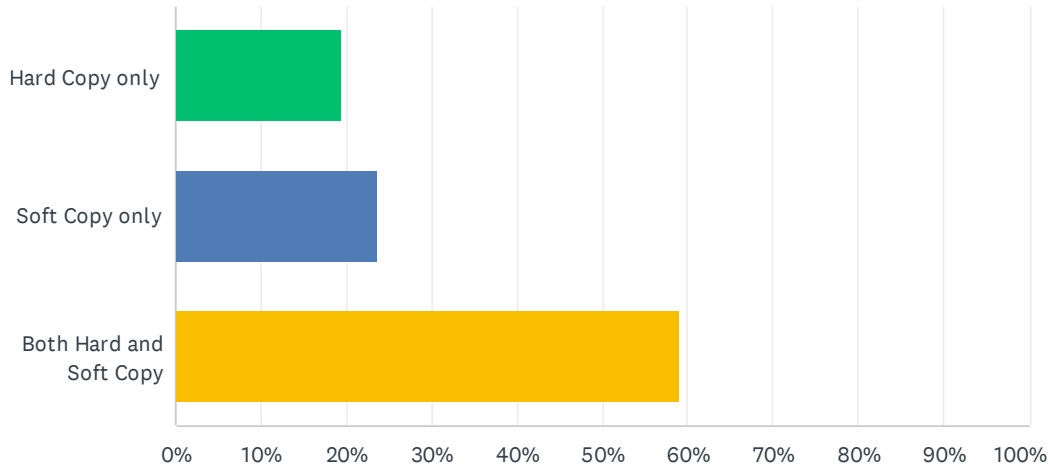
Answered: 93 Skipped: 0



DETRACTORS (0-6)	PASSIVES (7-8)	PROMOTERS (9-10)	NET PROMOTER® SCORE
5% 5	27% 25	68% 63	62

Q2 Do you receive the Annual Review document in hard copy or soft copy?

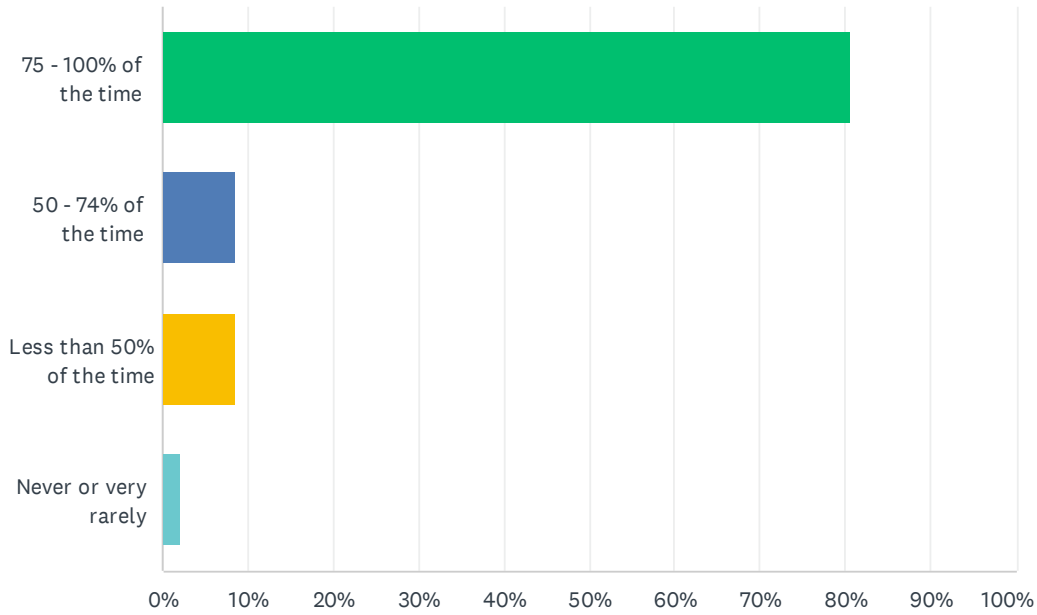
Answered: 93 Skipped: 0



ANSWER CHOICES	RESPONSES
Hard Copy only	19.35% 18
Soft Copy only	23.66% 22
Both Hard and Soft Copy	59.14% 55
Total Respondents: 93	

Q3 How often do you open and read the Annual Review document prior to the meeting?

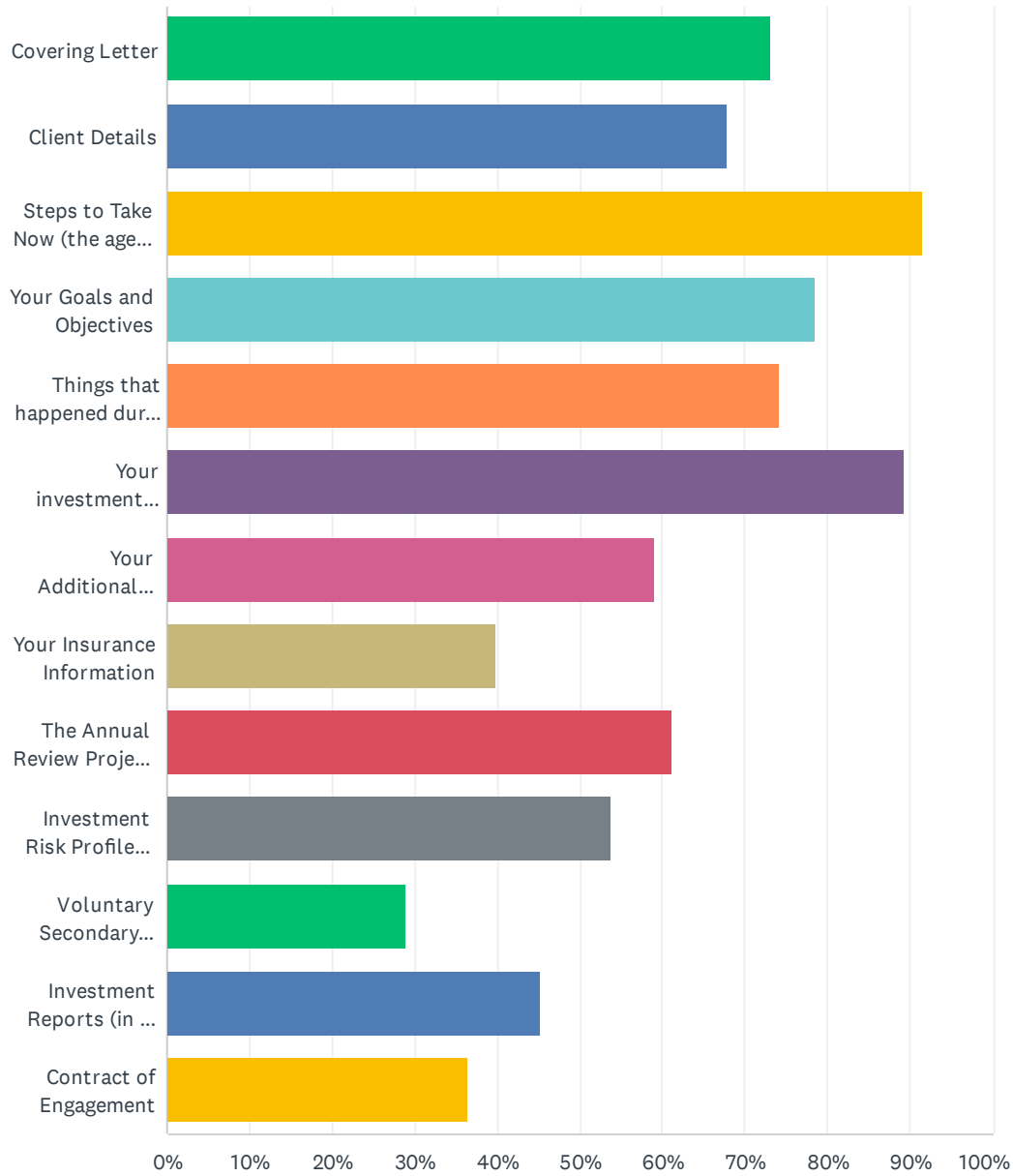
Answered: 93 Skipped: 0



ANSWER CHOICES	RESPONSES	
75 - 100% of the time	80.65%	75
50 - 74% of the time	8.60%	8
Less than 50% of the time	8.60%	8
Never or very rarely	2.15%	2
Total Respondents: 93		

Q4 Which sections of the Annual Review Document do you read (or skim read) most of the time - answer all the apply?

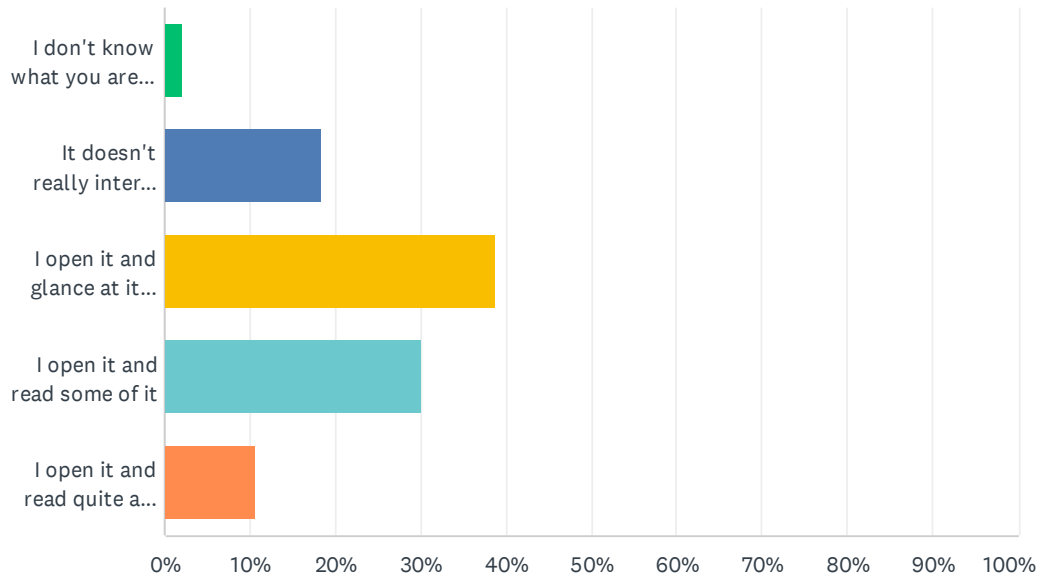
Answered: 93 Skipped: 0



ANSWER CHOICES	RESPONSES	
Covering Letter	73.12%	68
Client Details	67.74%	63
Steps to Take Now (the agenda for the meeting)	91.40%	85
Your Goals and Objectives	78.49%	73
Things that happened during the year	74.19%	69
Your investment information	89.25%	83
Your Additional Financial Information	59.14%	55
Your Insurance Information	39.78%	37
The Annual Review Project information	61.29%	57
Investment Risk Profile information	53.76%	50
Voluntary Secondary Disclosure	29.03%	27
Investment Reports (in the appendices)	45.16%	42
Contract of Engagement	36.56%	34
Total Respondents: 93		

Q5 How often do you read the 'Additional Financial & Legal Information that we send through the Google Drive link? This is not your Annual Review document, it is all the technical and legal information about the investments

Answered: 93 Skipped: 0



ANSWER CHOICES	RESPONSES
I don't know what you are talking about	2.15% 2
It doesn't really interest me - I don't open it	18.28% 17
I open it and glance at it but don't really read anything	38.71% 36
I open it and read some of it	30.11% 28
I open it and read quite a bit of it	10.75% 10
Total Respondents: 93	

Q6 Do you have any suggestions for things that could be included or excluded or changed in future Annual Review Documents?

Answered: 38 Skipped: 55

Q7 Is there anything else you would like us to know, or anything that you think that we could do better?

Answered: 38 Skipped: 55