

**Clever.**

# Client Satisfaction Survey

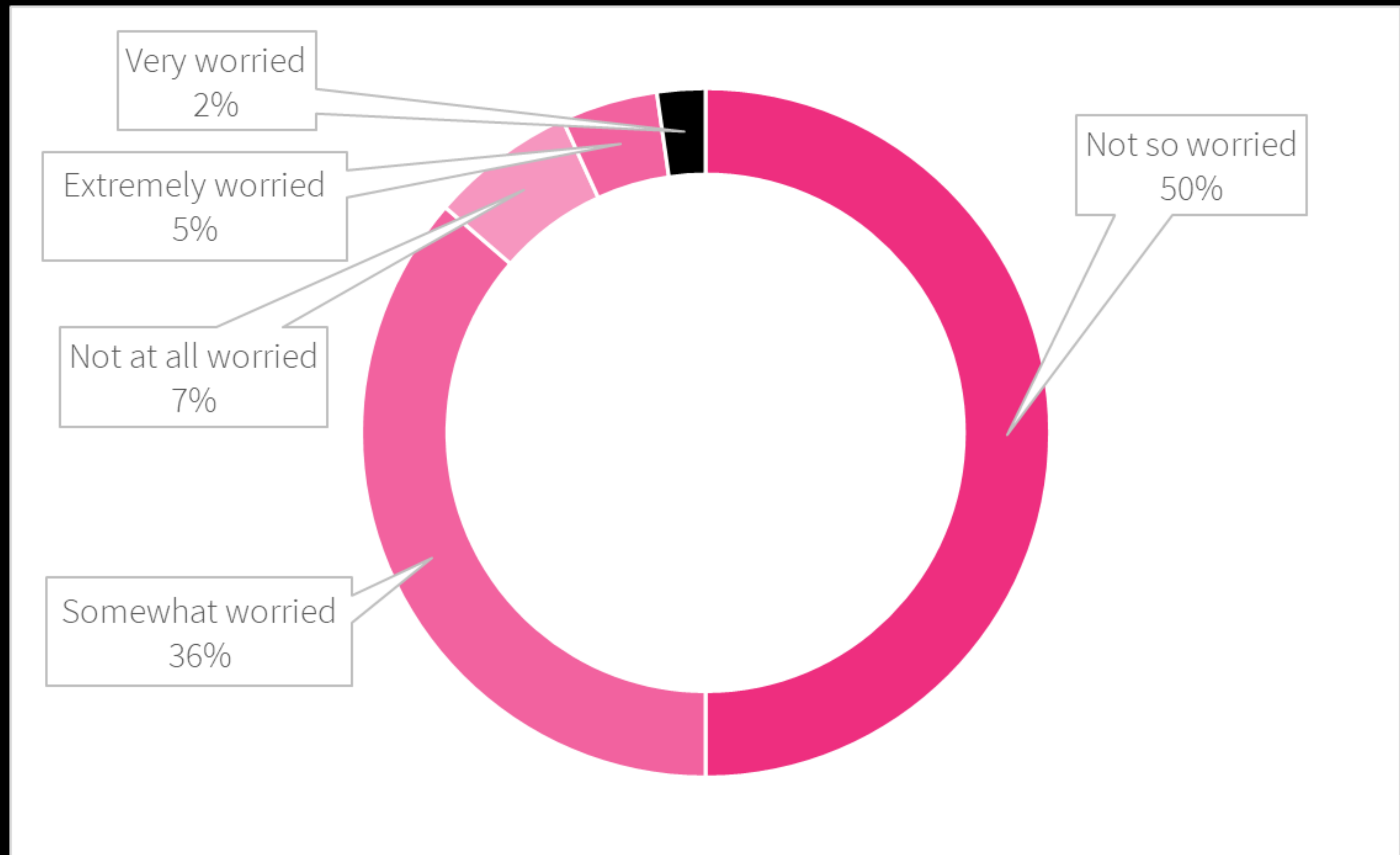
## How can we help

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## How worried are you about the impact of COVID-19 on your company?

- Just 7% of clients are 'not at all worried' about COVID-19, although 57% of clients surveyed expressed very little or no concern about the situation
- 43% are actively worried about the impact of COVID-19 on their business

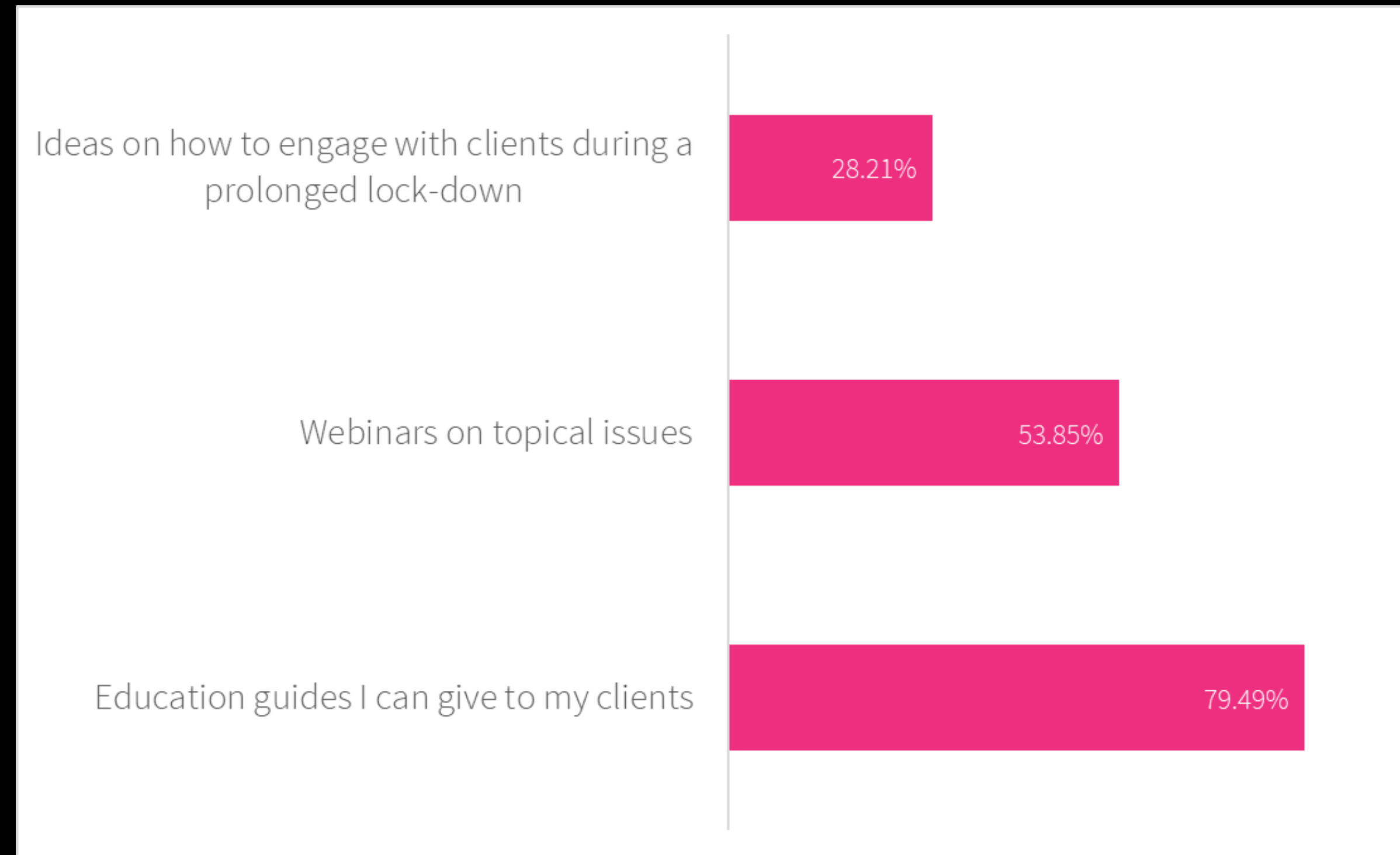


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## What types of resources would be helpful for your business?\*

- IFAs are most interested in education guides they can give to investors, as evidenced by CleverInsights engagement – we should ask them to pick/suggest topics we should prioritise
- Webinars are also popular among our IFA clients

\*Respondents were allowed to select as many options as they wanted



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## What concerns you most about your business over the next 6 months?\*

- IFAs feel clients will judge them on performance of their portfolios
- The frequency and pace of regulatory change is of great concern – content on these issues is well received
- IFAs more concerned about investment charges than platform charges
- Communication with clients a top four concern

\*Respondents were asked to rank each item on the list



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How useful is the content Clever provides in assisting you with clients?

- Of almost equal importance to IFAs are:

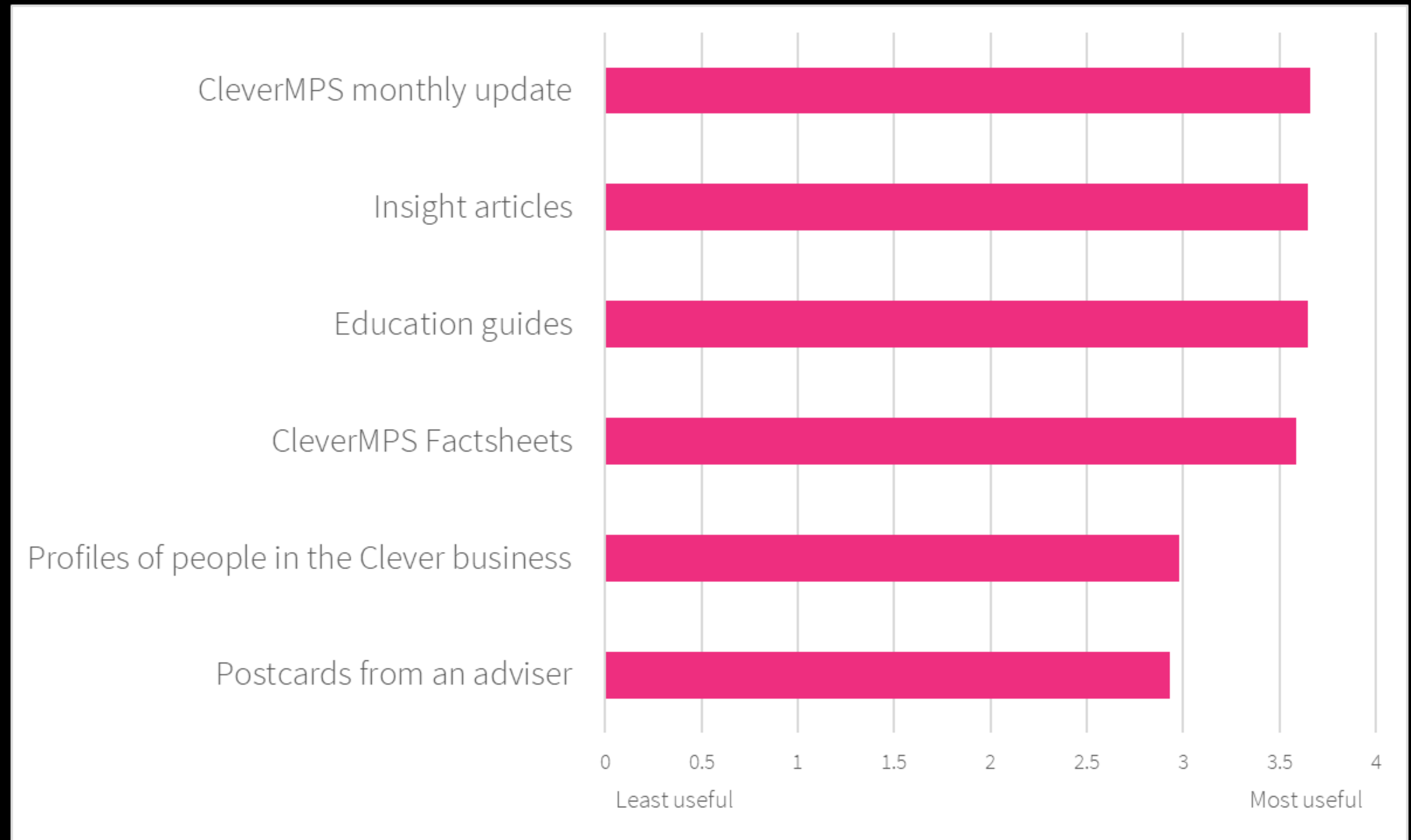
- CleverMPS monthly update

- Insights

- Guides

- CleverMPS factsheets

- This represents a good balance of product information and thought leadership content



- ESG - the larger we get the larger the funds that we switch in value
- ESG versions
- ESG solutions
- How each sector compares to its relevant index rather than the usual benchmark
- How the Clever choices perform against the index in each of the sectors
- How Clever is proactive rather than reactive. Switches based on current performance
- Decumulation investment strategies using CleverMPS
- Unitised offerings
- Adviser being able to complete fund comparisons independently
- Training