

**Background**

As part of our commitment to service excellence, we have been regularly conducting client satisfaction surveys since 2005. The valued feedback we receive helps us measure, and subsequently enhance, our clients' individual and collective experience with our firm. Every six months we ask a subset of our clients to complete the survey with the goal of each client participating every 24 months.

Cumulatively, 585 surveys have been completed. Below is a summary of the results for 2011, along with seven-year averages where available. Questions are either scored on a 1 to 10 (highest) scale or are simply answered yes or no.

**Overall Satisfaction**

	2011	7-Year Cumulative
Confidence in Truepoint and overall satisfaction with services	9.38	9.40
Expectations being met or exceeded	99%	97%
Likely to refer Truepoint to others	98%	98%

**Specific Areas of Focus**

Advisory Team	2011
Professional Competence	9.61
Responsiveness	9.67
Proactivity	9.37
Personal Relationship	9.56
Satisfied with the frequency of interaction	95%

  

Portfolio Management	
Understanding of investment philosophy	9.20
Review quarterly letter	96%
Content and format of quarterly report	9.04

  

Resources	
Find online access to accounts via TruepointInc.com valuable	66%
Find value in educational content provided	88%

These results, along with specific client comments, guide our continuous improvement efforts. We are grateful to those clients who have participated in our client satisfaction survey and look forward to hearing from those who will participate in the future.