

Working With Us

2021 Survey Results

More CWM clients than ever before took part in our annual survey, providing incredible insights, feedback and industry benchmarking.

We're proud of the results, and have already begun implementing lessons learned to ensure we reach even greater heights in 2022.

CWM among the best in the industry as rated by clients

CWM NET PROMOTER SCORE
COMPARED TO PEER GROUP

81.7

77.8

Our score improved by 3.9% in 2021, and is comfortably above our peer benchmark from 13,902 responses across Australia and New Zealand.

94%
satisfaction

We get you

We know that understanding your wealth goals and needs, and clear communication, are your top priorities in your relationship with your adviser.

These survey results show that our efforts to provide the personal touch have not gone unnoticed, and we'll strive for continuous improvement in these areas.

4.9
out of 5

**Accessibility
of adviser**

4.8
out of 5

**Responsiveness
of my adviser**

4.9
out of 5

**Understanding my
needs and goals**

4.8
out of 5

**Explains financial concepts
in a way I can understand**

Lessons we've learned

1. Experience always counts.

It's not so much about the latest investment tips, tricks and fads. Our clients want to work with advisers who have experience and a track record of success with others like them.

2. Solutions for uncertainty.

The volatility of the post pandemic world means our clients want security and stability more than ever. While we scored 4.7/5 in this category, we know that providing peace of mind to our clients will continue to be key.

3. Keep it simple.

The results also drove home the importance of simplicity. We need to continue to cut through the noise and help you understand what really matters.

Ultimately, wealth management is not one-size fits all. It is our ability to tailor strategies to your needs and goals that sets us apart. So getting to know you, your family and where you want to get to in life is crucial.

We know that putting your wealth in our hands is no small thing. It is an honour, and we're grateful for your trust.

Even when feedback is great, we won't ever settle. We want to continue to improve, and serve you better, so please let us know if there's anything else we could do to help you achieve your goals.



What we're going to do

1. Strategise for the times, and your needs.

We're focusing on giving you increased confidence in your wealth strategy, giving you more peace of mind.

2. Share the stories and learnings.

Knowing our experience with others similar to you is important, so we'll share more real life client stories and what we've learned.

3. Keep our door open.

You love having great access to your adviser, and that's something we'll continue to make easier as we help you navigate your wealth journey.



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