

Client Survey 2015

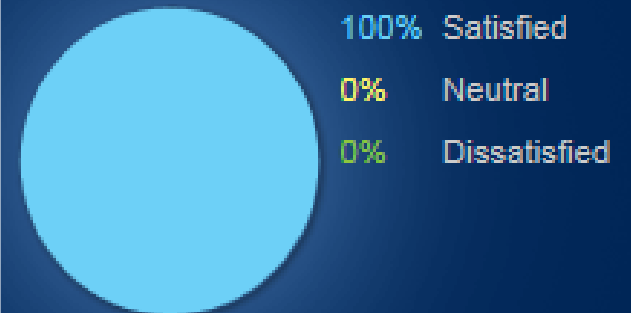
Client Engagement Insights

The McClelland Financial Group of Assante Capital Management Ltd.

2015 Client Survey Results

In 2015 we contracted an independent consultant to conduct an audit of our client base to ensure that the service we provide is appropriate. We are very pleased to say that the results were overwhelmingly positive.

SATISFACTION WITH ADVISOR



Goal

Our goal is to help our clients comfortably reach their goals for retirement and for life.

Critical to that process is providing a consistently high level of service that meets the needs of individual clients.



Ratings

100% of our clients are satisfied with the overall relationship.

Summary of Results

- Overall satisfaction with the relationship (96%)
- Advisor is trustworthy (98%)
- Calls are returned promptly (96%)
- Client would refer to friends, family and colleagues (96%)
- Client is comfortable with plan to meet retirement goals (94%)



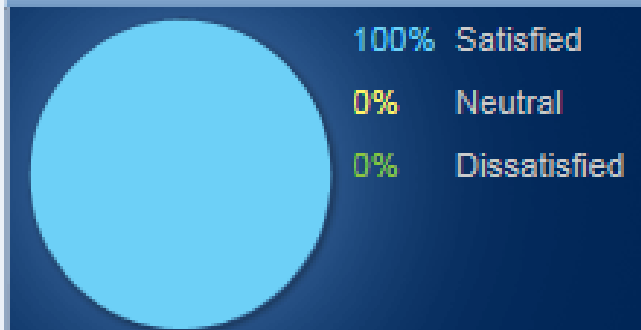
Ratings

You might also be interested to know that our clients say that the two things that are most important to them in any relationship with a financial advisor are as follows:

- Having a clear plan in place to meet retirement goals
- Advisor is trustworthy

We were therefore pleased to receive such high ratings on these dimensions..

SATISFACTION WITH ADVISOR



Comments

1. I am 100% satisfied with my Financial Advisor at Assante. The main reason is that I trust him.
2. He understands my financial needs and has been very helpful in dealing with my concerns and future financial well being of my mentally challenged adult daughter.
3. Service is excellent, no suggestions.
4. I am very satisfied with the level of service I receive from my Advisor.
5. This year I had a great spontaneous phone conversation and part of the conversation what unsettling developments in the market; it was no more than 15 minutes but very reassuring.



Ratings from Top Clients

- My advisor gives me piece of mind. (94%)
- My advisor takes a proactive approach to managing our relationship. (98%)
- My advisor fully understands my goals for the future. (96%)
- My advisor regularly reviews my objectives to understand if my needs have changed. (96%)
- The range of services that my advisor provides meets all of my financial needs. (90%)



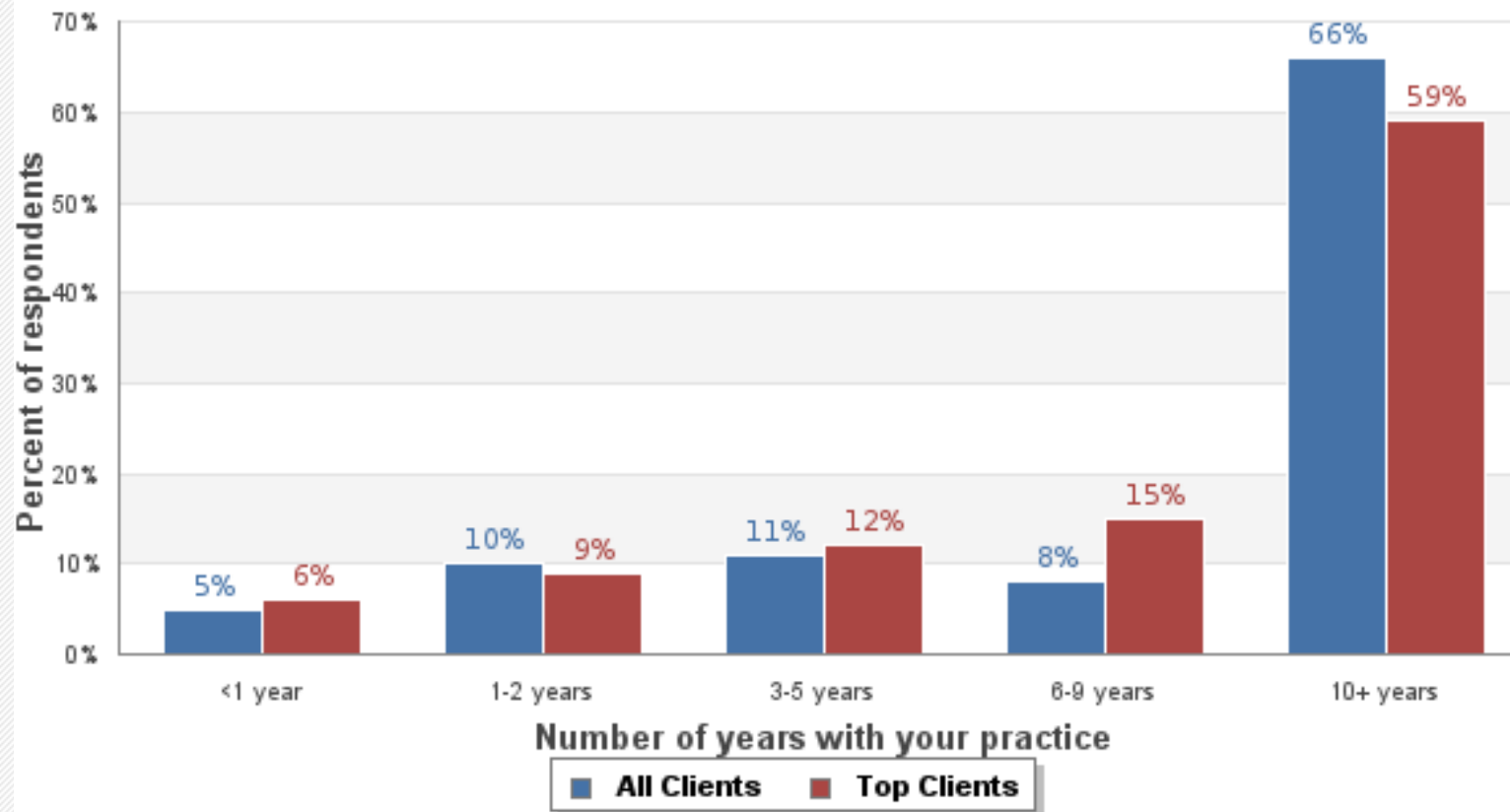
Ratings

- In the last 12 months **97.5%** of our clients had a face-to-face meeting with our advisors 2 or more times a year.
- Our top clients have **92%** of their investable assets with us. (this includes mutual funds, stocks, bonds, GICs, RRSPs etc. and excludes their home)
- **98%** of clients say our advisor puts the needs of me and my family first when making recommendations regarding our plan or portfolio.

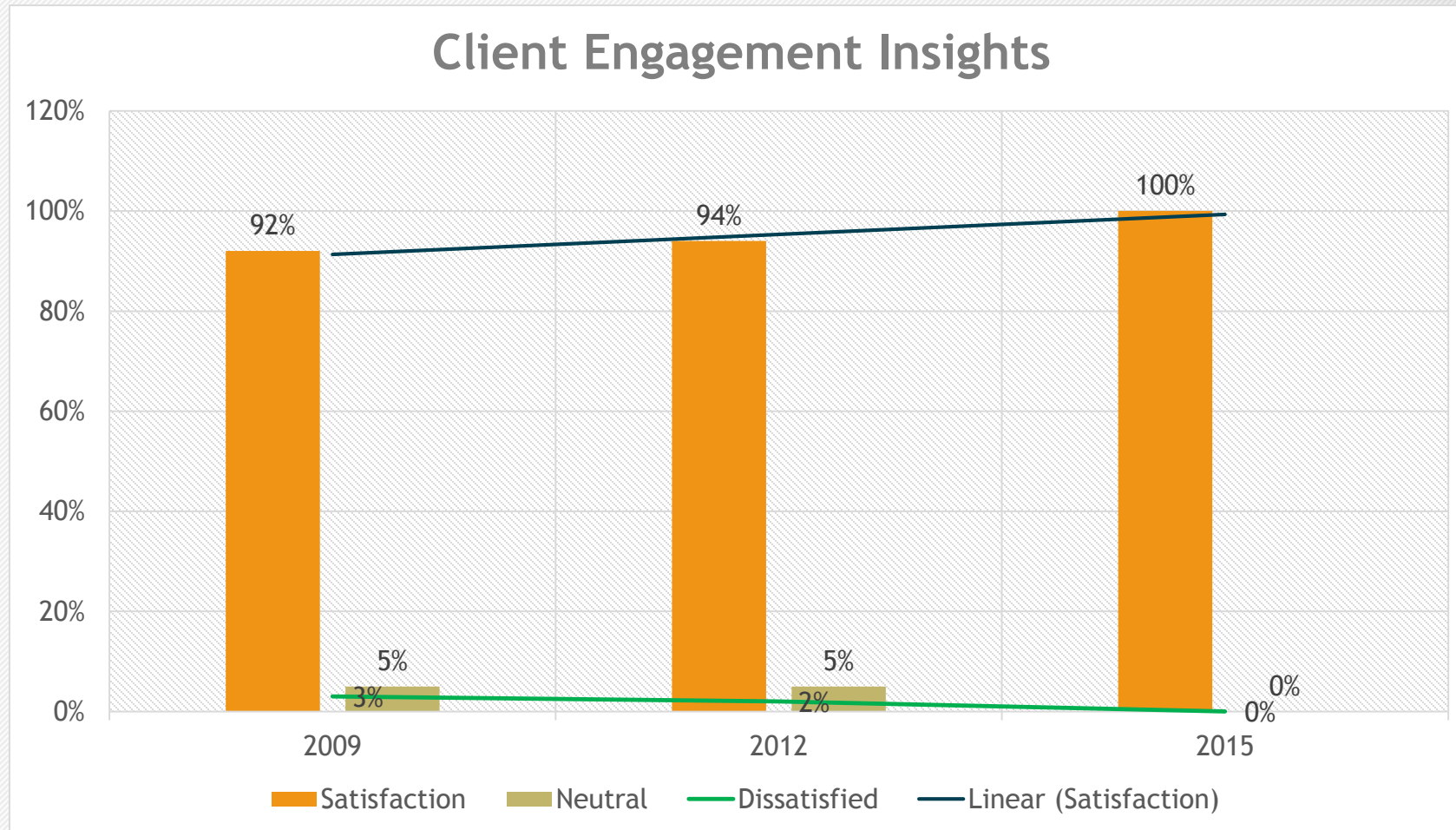


Long-term relationship

How many years have you been working with The McClelland Financial Group of Assante Capital Management Ltd?



2009 - 2012 - 2015 - We are always improving



Top Services

Four of the Top Services that our Clients want to know more about.

- Trust Services
- Tax Preparation Services
- Long-term Care*
- Critical Illness*



Our Services

We are full service financial planners we simplify and enhance your financial lives.
Here are some of the services we provide.

- Investment Planning
- Trust Services
- Tax Planning
- Long-term care Insurance*
- Critical Illness Insurance*
- Life Insurance*
- Disability Insurance*
- Will Services
- Professional Referrals



Questions?

Contact us at 905 771 5200...

*Assante Capital Management Ltd. is a member of the Canadian Investor Protection Fund and is registered with the Investment Industry Regulatory Organization of Canada. *Insurance products and services are provided through Assante Estate and Insurance Services Inc.*



The McClelland
Financial Group