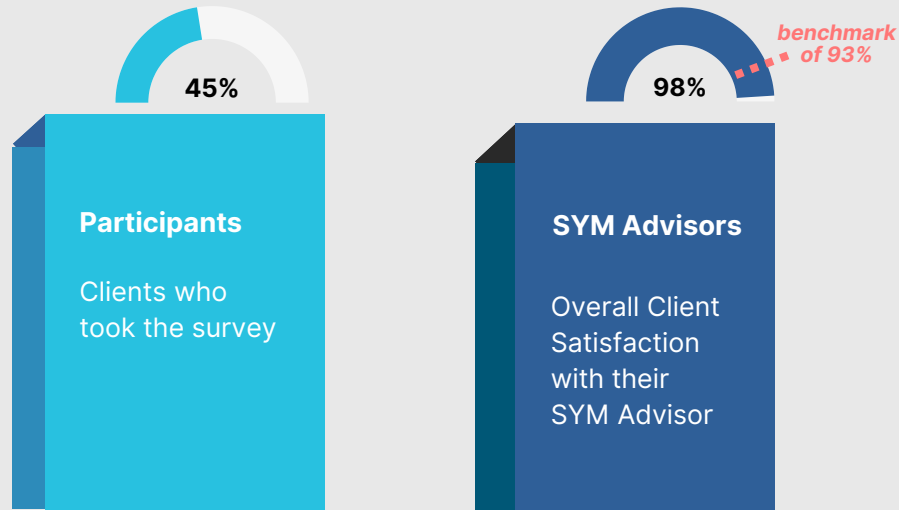
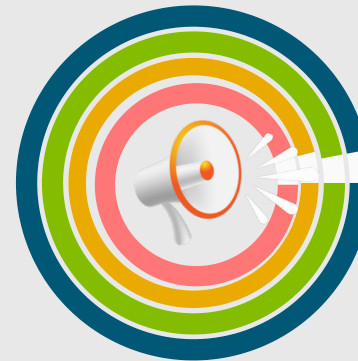


SYM is pleased to announce our client survey results!
Here are some highlights.

Overall Results

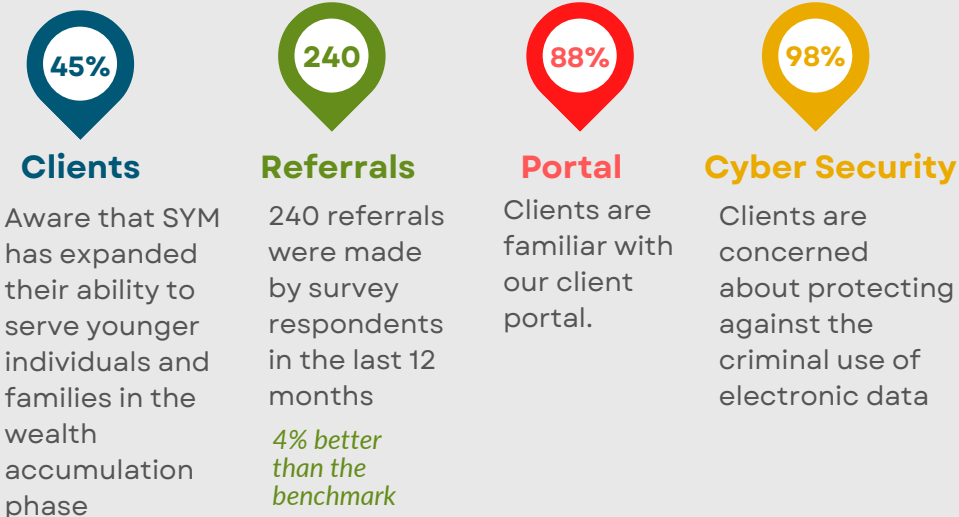


Things We Learned



- 95%** 89% benchmark
"I have a clear plan in place to reach my goals."
- 96%** 87% benchmark
"My advisory team is proactive in managing our relationship."
- 97%** 93% benchmark
"I am confident in the skills of my advisor's team."
- 97%** 94% benchmark
"My advisory team responds to my questions in a timely and complete way."

What Caught Our Attention



Top Impacts of Working with SYM

- 1** *"I/we now have a clear and meaningful vision for my life in retirement."*
- 2** *"I/we feel more confident that my family will be okay should I pass away first."*

Top 3 Topics of Interest

- 1** Dealing with the rising cost of health/long-term care
- 2** Managing wealth across generations
- 3** Ensuring spouse is taken care of should you pass away first