



Client Survey Results

This year, for the first time, The Fry Group has undertaken a client survey and we thought it only right and proper that we let you know what you, our clients, feel about us. The first thing to note is that we have had an excellent response with several hundred clients replying when apparently these surveys usually generate quite a modest level of response. Our thanks to everyone who took the time and trouble to help us in this way.

Almost everyone said that they would be prepared to recommend our services to friends and colleagues. Most of our business comes through recommendation and if you know of anyone who needs guidance with capital investment, regular savings, pension, tax, trust and probate issues, do please let them know that we can help.

Again, almost all respondents rated our service as either excellent or good.

We note that most clients chose initially to work with us based on our reputation, heritage, integrity, and personal service.

Somewhat surprisingly more than 50% still associate The Fry Group with tax advice and although this has been a core proposition for many years, most of our income has been derived from investment services. If you were not aware that we provide investment services and would like our help do please let us know.

In these uncertain times it is understandable that a high proportion of clients express concern about generating sufficient income for their retirement, whilst at the same time wanting to minimise tax liabilities.

Finally, it would be quite inappropriate for us to highlight the positive messages without recognising that there is always room for improvement. It would seem that clients are keen to receive from us communications as regularly as possible with pro-active advice and swift turnaround at times when queries are raised. These are areas we are constantly looking to improve and it is good to be reminded that we need to continue to improve. From time to time we will repeat this survey exercise and I hope that you would be able to find the time to respond.

If in the meanwhile there are any issues you would like to raise, please do not hesitate to get in touch.

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Want to talk?

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