

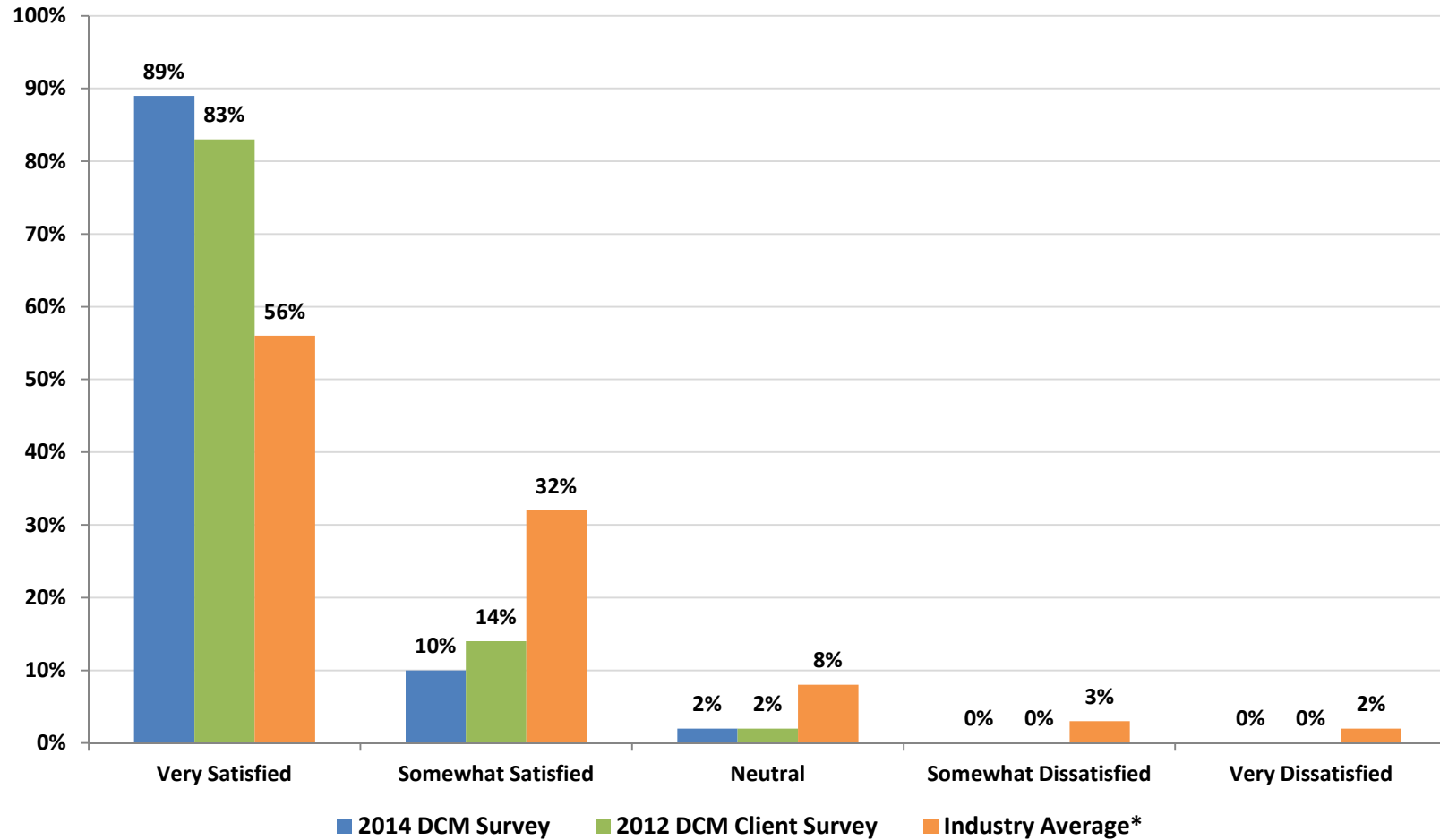


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Client Satisfaction Survey Results

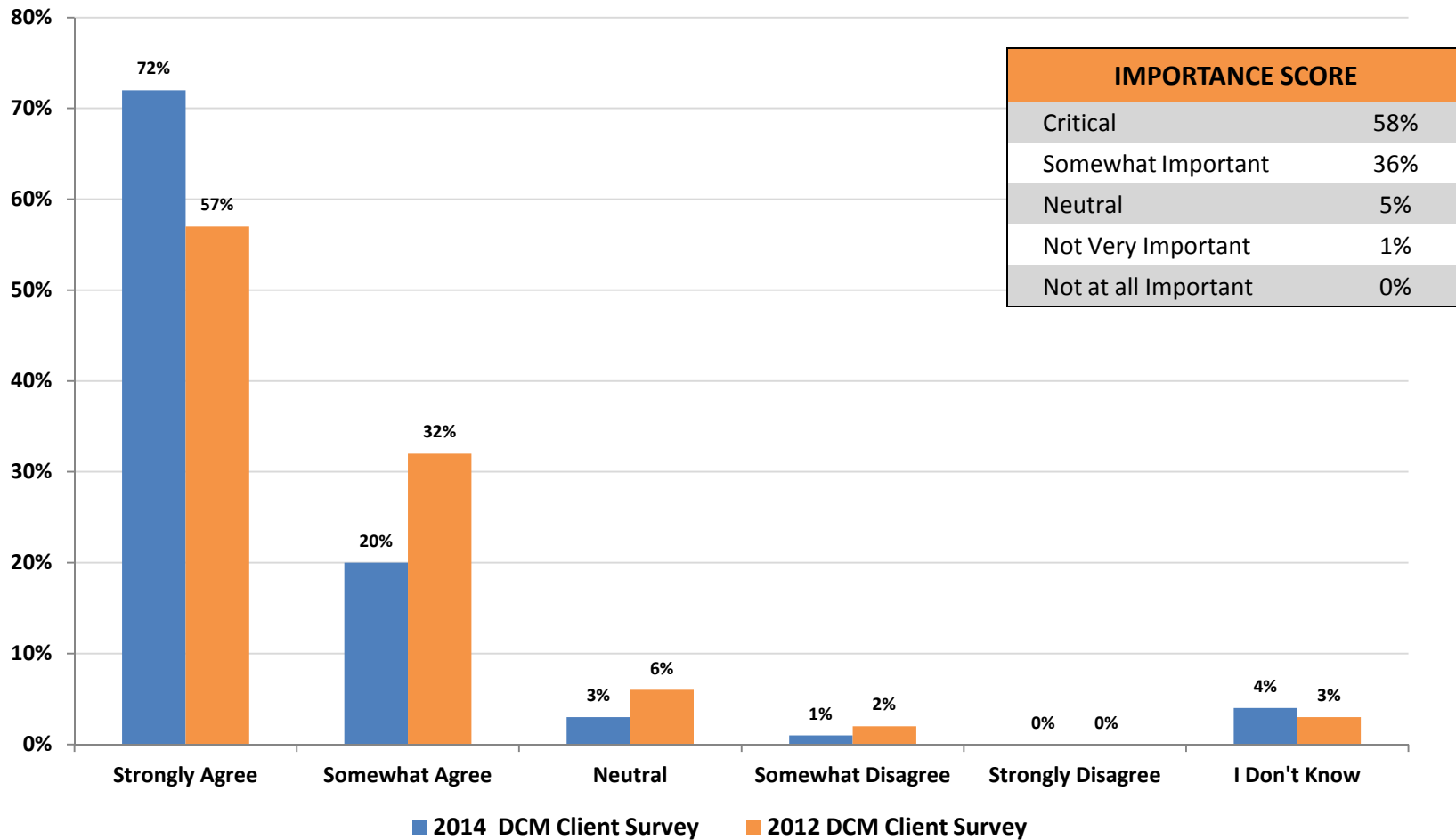
August 2014

Client Satisfaction Overall



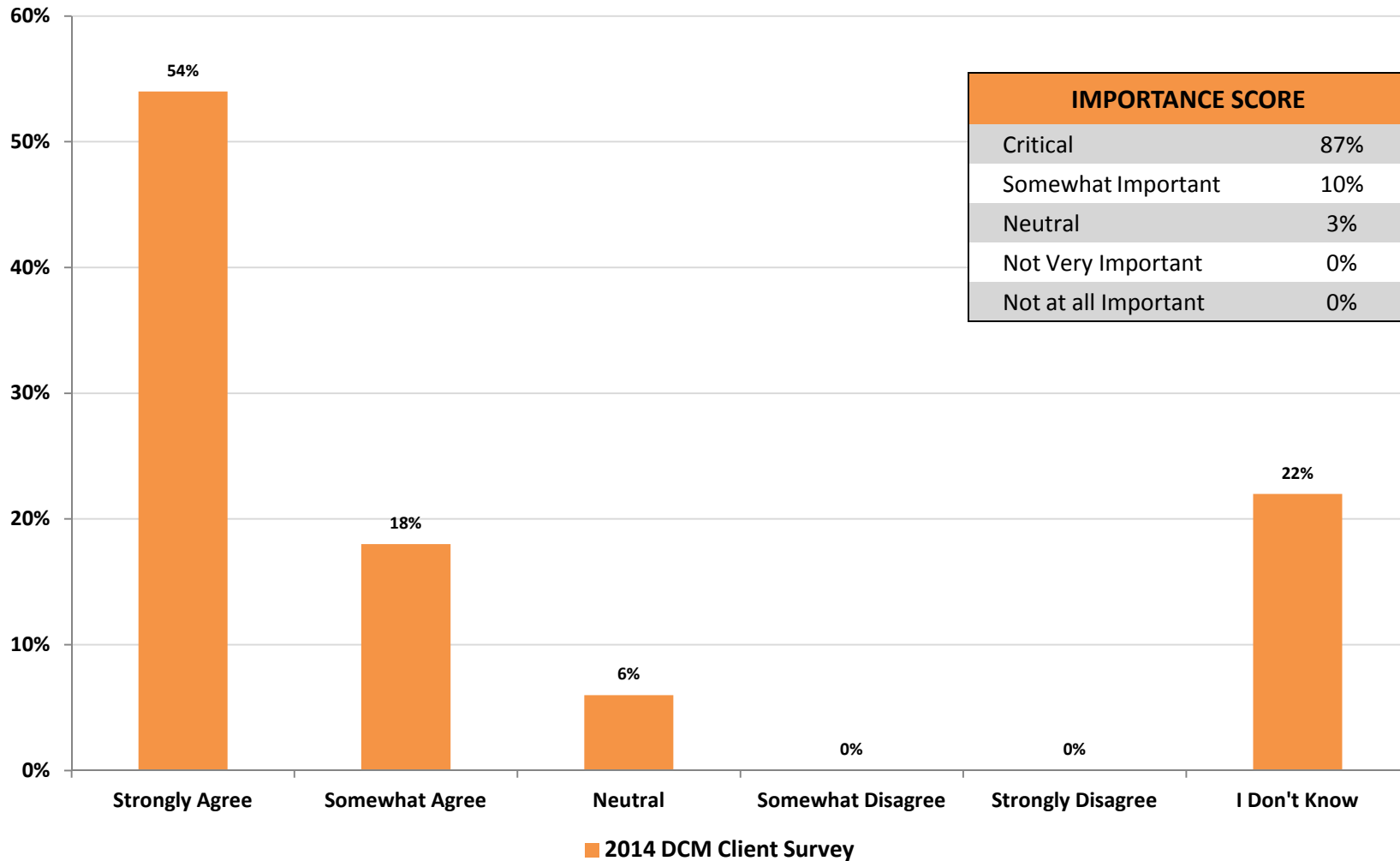
Client Satisfaction data comes from the DCM August 2014 & July 2012 Client Satisfaction Surveys, both conducted by Advisor Impact.
Industry average comes from *Rules of Engagement*, a study published in June 2014 by Advisor Impact and AssetMark.

The short to mid-term performance (1-5 years) of my portfolio meets my expectations.



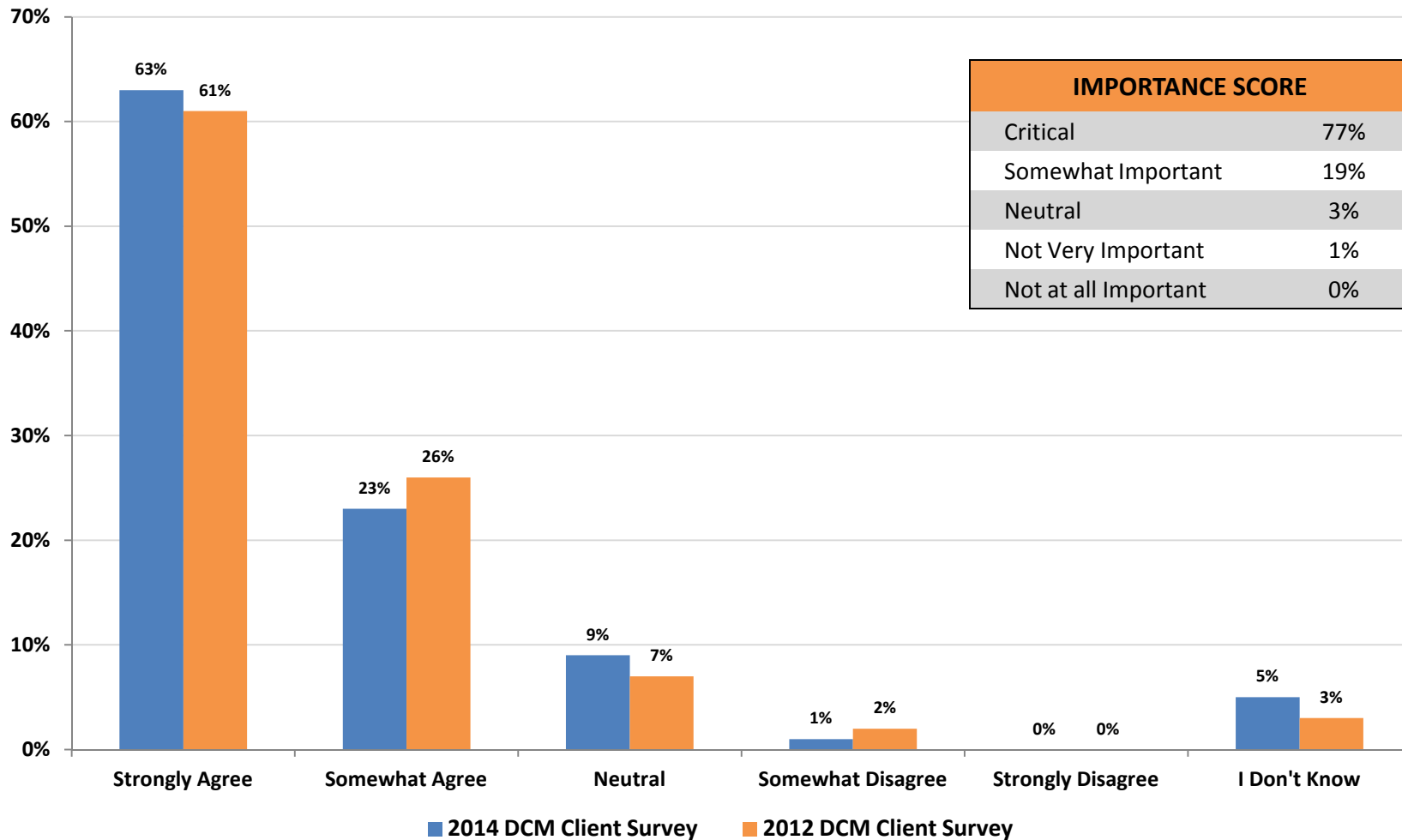
Client Satisfaction data comes from the DCM August 2014 & July 2012 Client Satisfaction Surveys, both conducted by Advisor Impact.

The long-term performance (6+ years) of my portfolio meets my expectations.



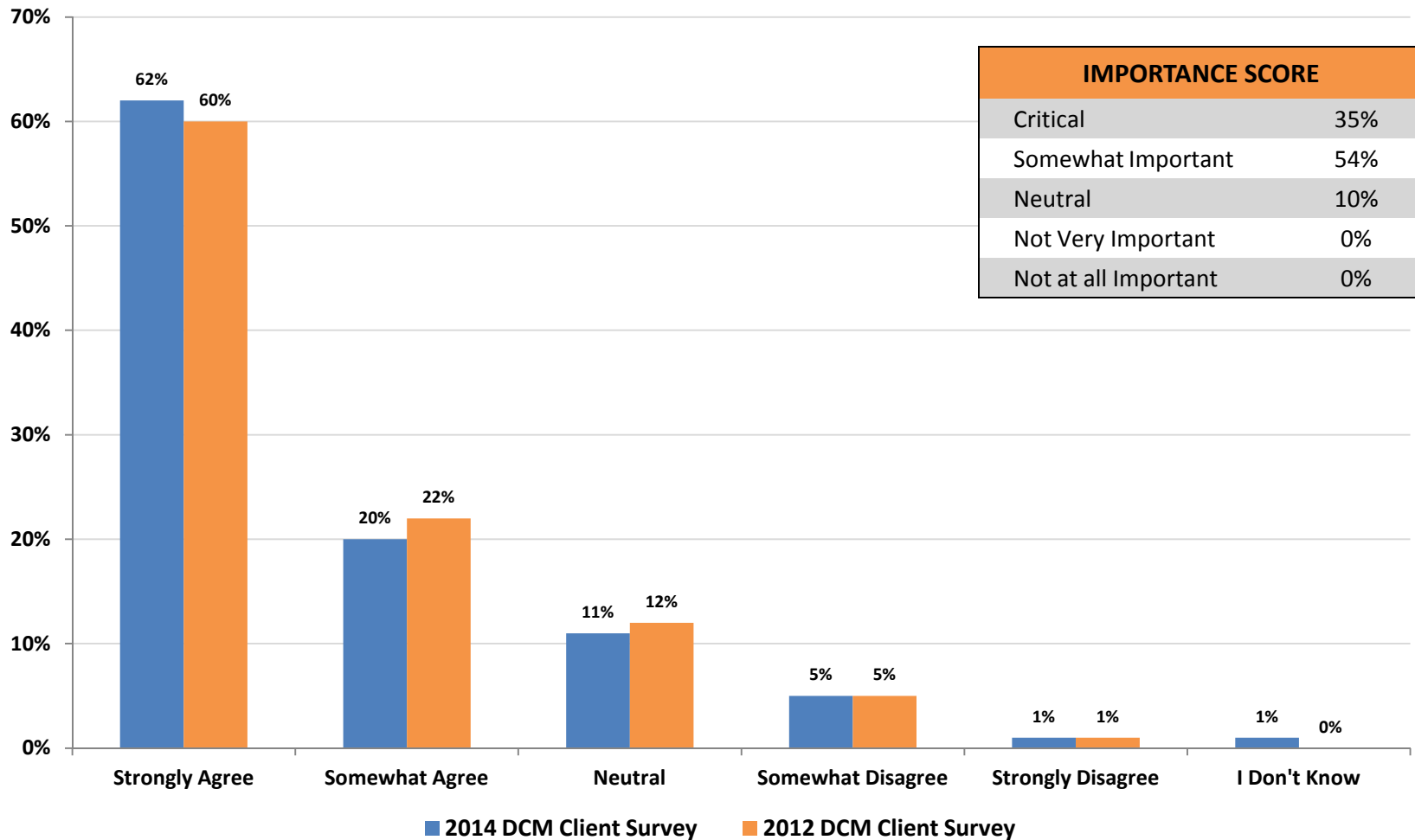
Client Satisfaction data comes from the DCM August 2014 & July 2012 Client Satisfaction Surveys, both conducted by Advisor Impact.

The advice I receive from my advisor will help me to limit the negative impact of down markets.



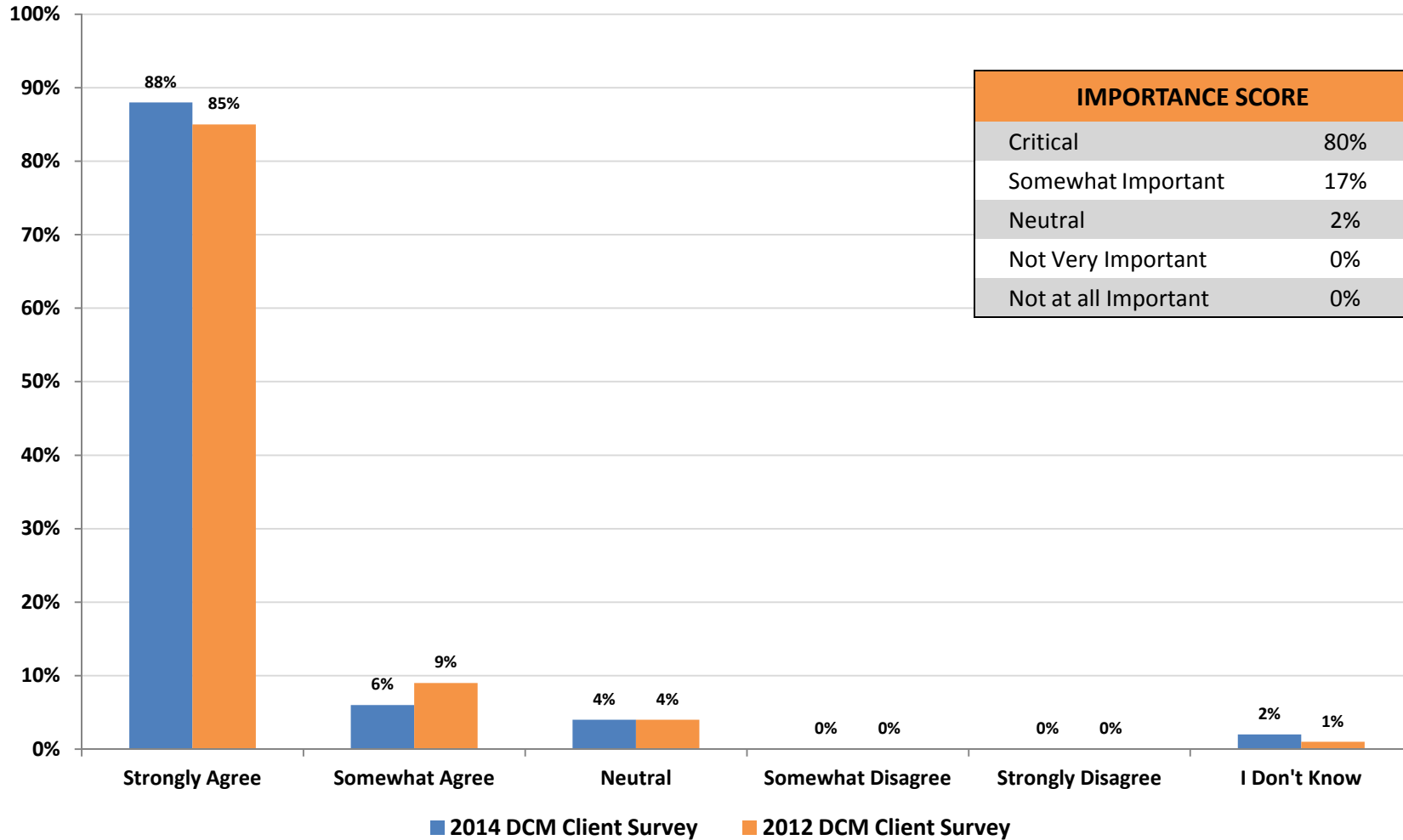
Client Satisfaction data comes from the DCM August 2014 & July 2012 Client Satisfaction Surveys, both conducted by Advisor Impact.

The frequency with which my advisor contacts me meets my needs.



Client Satisfaction data comes from the DCM August 2014 & July 2012 Client Satisfaction Surveys

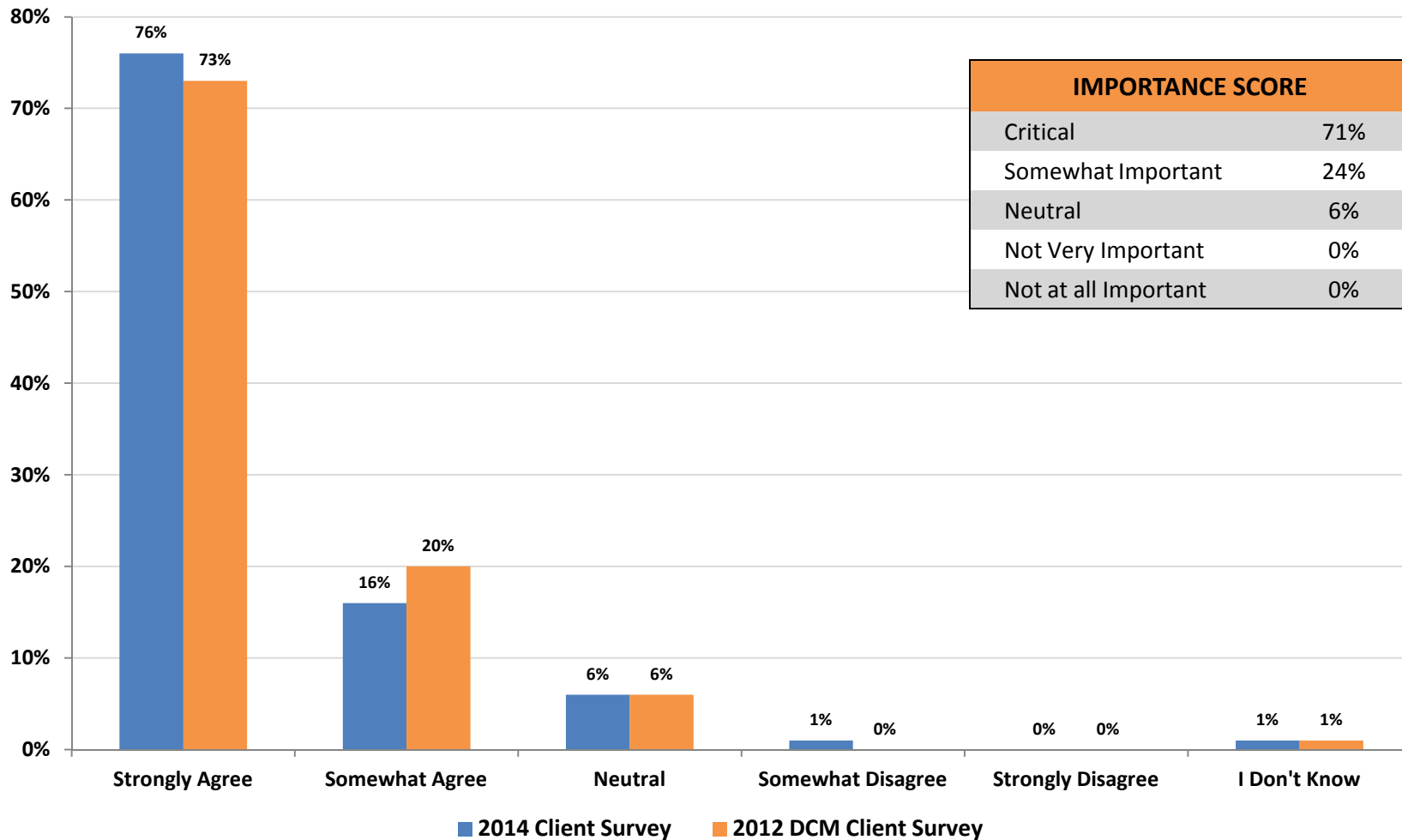
Any problems I encounter are resolved quickly.



IMPORTANCE SCORE	
Critical	80%
Somewhat Important	17%
Neutral	2%
Not Very Important	0%
Not at all Important	0%

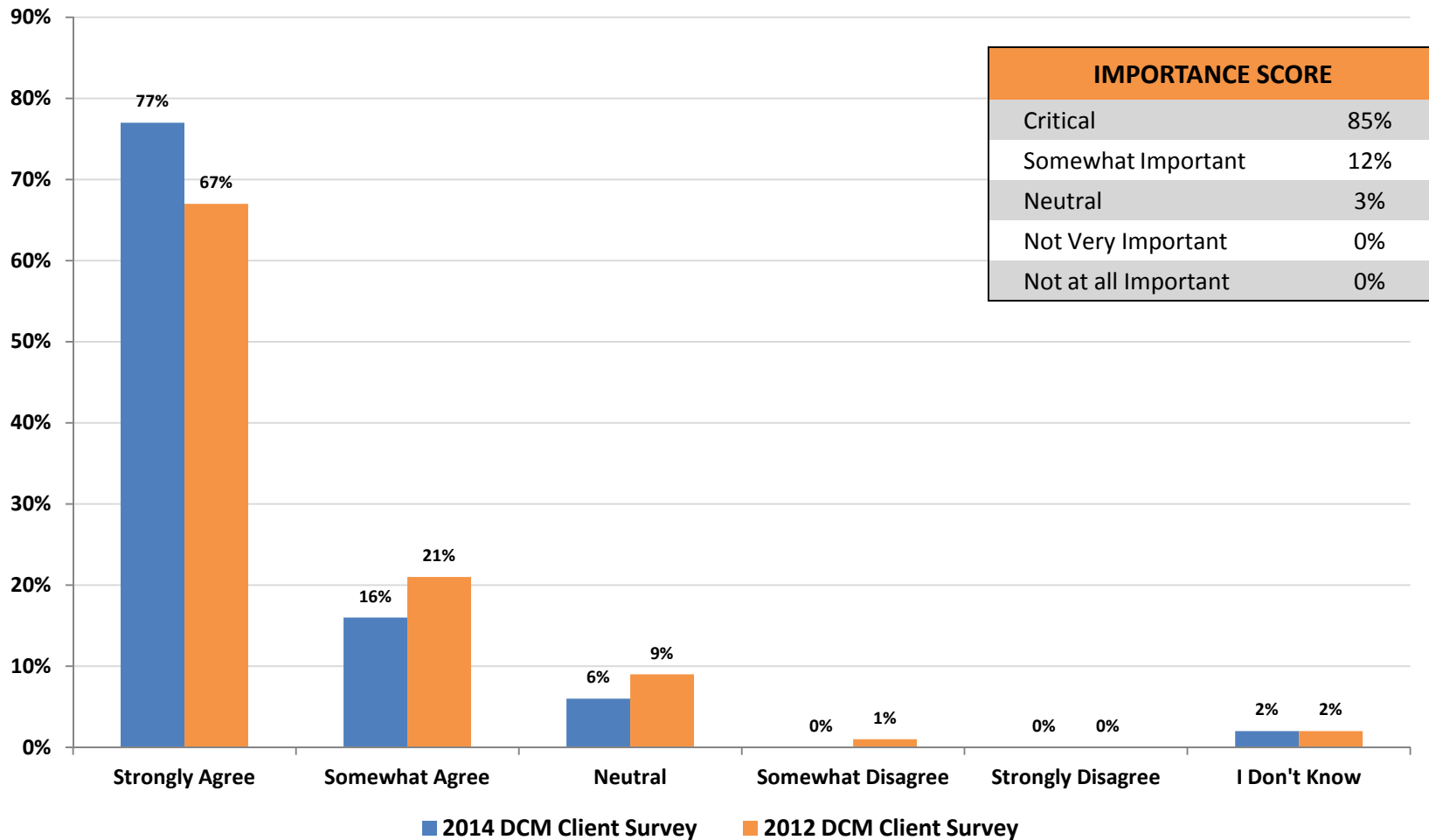
Client Satisfaction data comes from the DCM August 2014 & July 2012 Client Satisfaction Surveys

Difficult financial concepts are clearly explained.



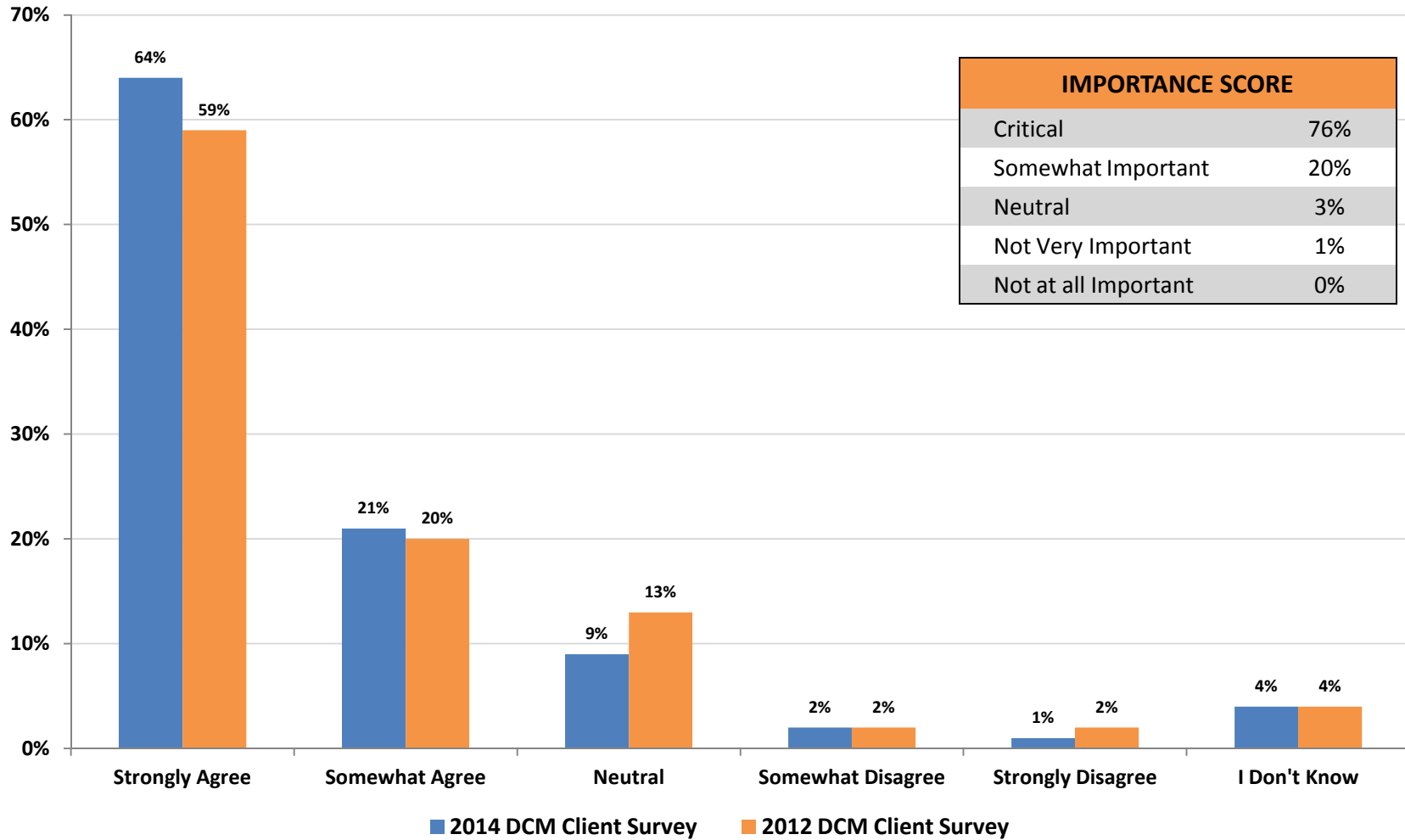
Client Satisfaction data comes from the DCM August 2014 & July 2012 Client Satisfaction Surveys

The advice my advisor provides is helping me create a better financial future.



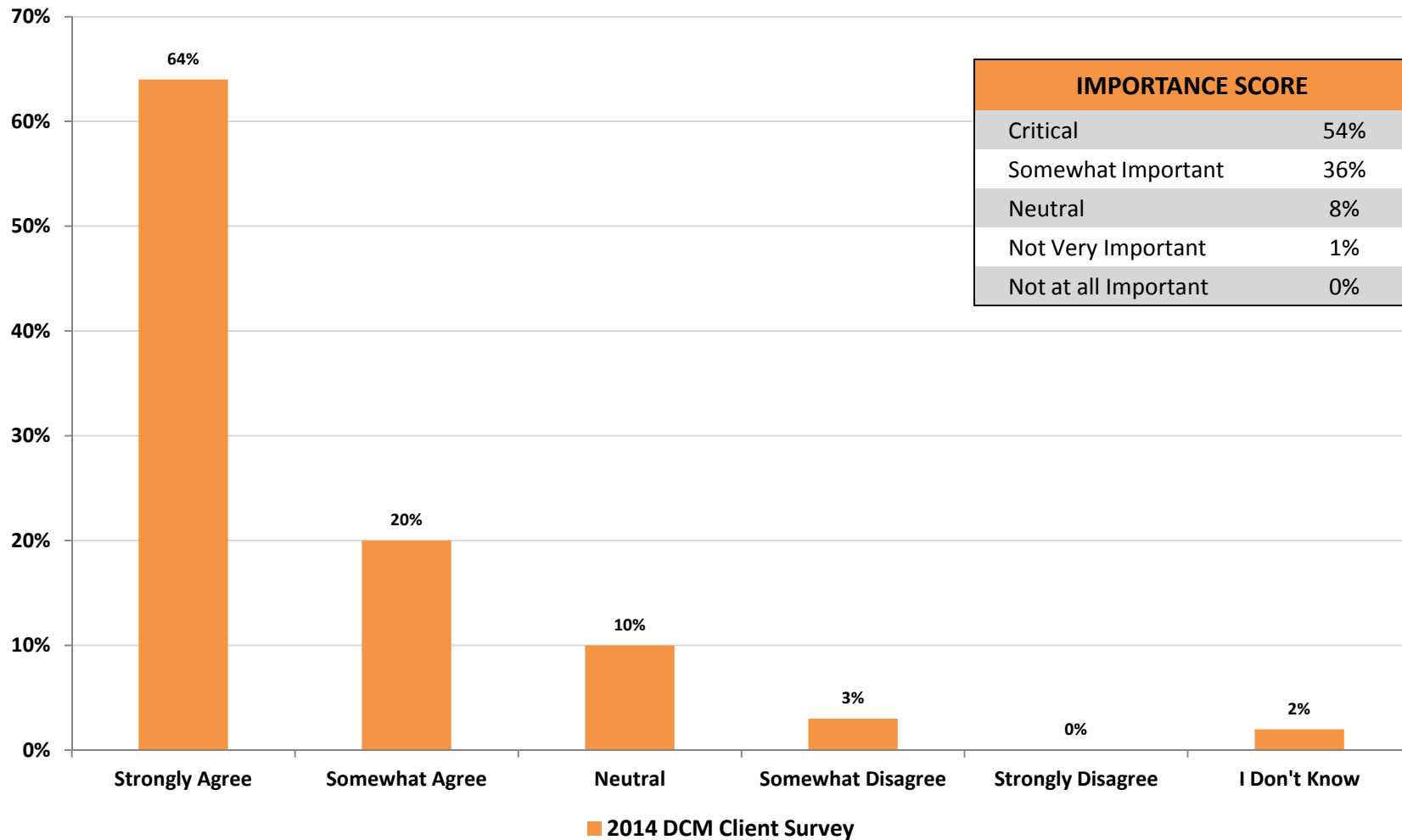
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My advisor regularly reviews my objectives to understand if my needs have changed.



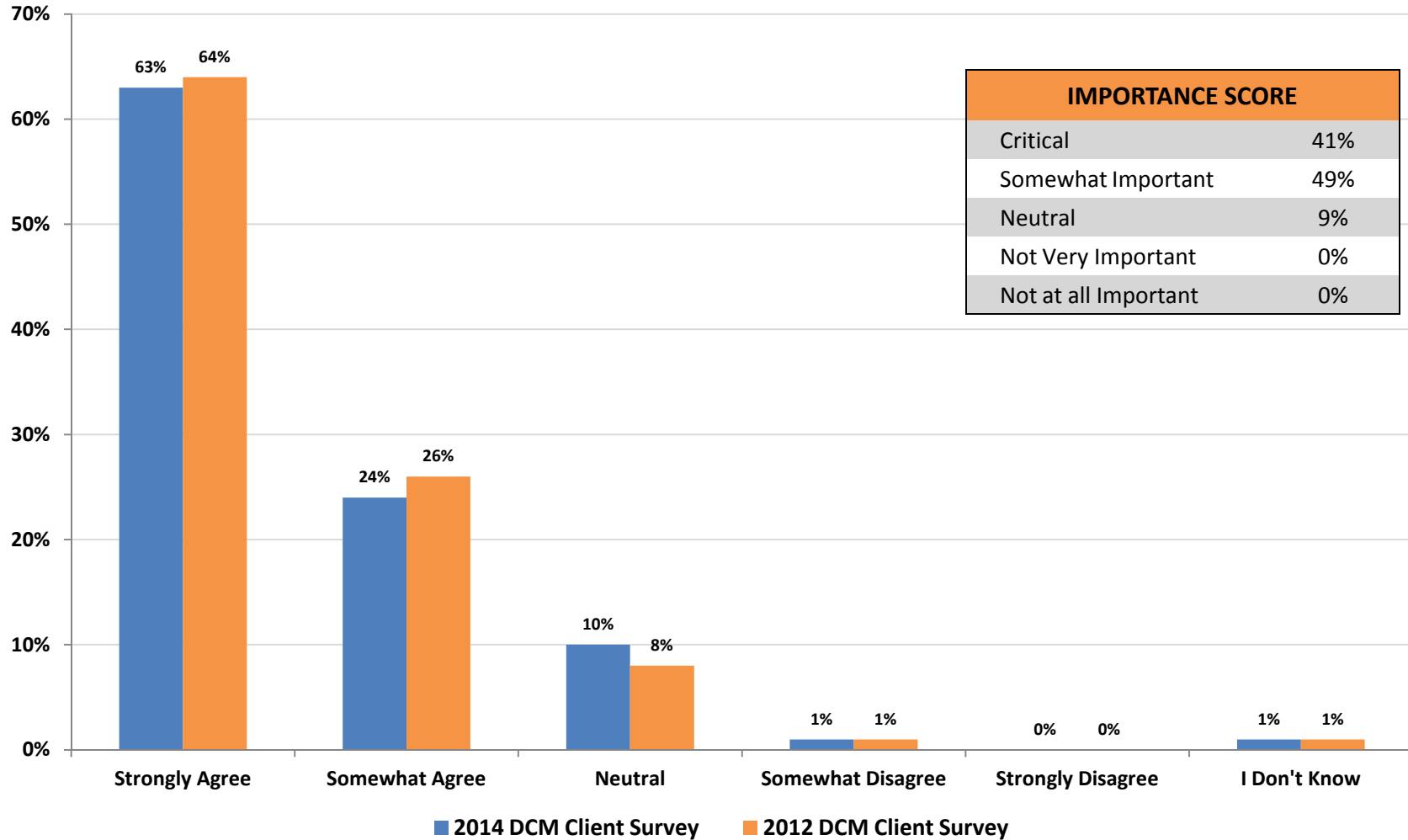
Client Satisfaction data comes from the DCM August 2014 & July 2012 Client Satisfaction Surveys, both conducted by Advisor Impact.

The range of services that my advisor provides meets all of my financial needs.



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The written communications I receive are valuable.



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