



**Wilson HTM**  
INVESTMENT GROUP

## **MEDIA RELEASE**

### **Highest Customer Satisfaction award for Wilson HTM**

**24 August 2010:** Wilson HTM Investment Group has recently received an award for Highest Customer Satisfaction from leading market research agency Investment Trends.

The Award is determined by results from the Investment Trends December 2009 High Net Worth Report, based on ratings given by over 7,000 investors. The award recognises Wilson HTM's efforts to provide its clients with both a sophisticated investment offer and a level of personalised service unavailable from larger institutions.

The report asked investors how they would rate Wilson HTM in specific areas. Wilson HTM rated 'Very good' or 'Good' by over 70 per cent of respondents for each area including:

- Transparency of fees (70 per cent)
- Investment Selection (70 per cent)
- Understanding and meeting my needs (85 per cent)
- Frequency of contact (72 per cent)
- Technical knowledge (84 per cent)
- Quality of support staff (74 per cent)

For the 'Overall' category, Wilson HTM was rated 'Very good' or 'Good' by 84 per cent of High Net Worth Investors. The report supports Wilson's 90 per cent Net Promoter Score and is consistent with previous client surveys.

The areas rated by clients specifically focused on the personal service provided by Wilson HTM and the report highlights the importance of qualitative support for investors in the investment process.

#### **Chris Saunders, Head of Financial Advisory said:**

*"The team at Wilson HTM are delighted to receive the Investment Trends 'Highest Customer Satisfaction' award. Customer satisfaction is a number one priority with all our advisers and this latest news highlights this dedication towards servicing High Net Worth investors.*

*"The Wilson HTM culture is to focus on the quality of service our investors receive and give investors confidence with how we invest their funds. We seek staff who mirror this culture and I believe this survey demonstrates this.*

*"With high net worth investors focusing more on direct equities; we offer the best of both worlds by combining financial advice with direct equities expertise. We have a holistic approach to meeting our clients' objectives where they benefit from having both a financial adviser and an investment adviser working for them."*

**-ends more-**



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**For further information or for an interview with Chris Saunders, please contact:**

Aideen McDonald  
BlueChip Communication  
02 9018 8618 / 0416 946 932

**About Wilson HTM**

Wilson HTM Investment Group is an ASX listed investment house dating from 1895 with \$10.1 billion in funds under management. The Company's investment philosophy is client outperformance, or alpha. The company has a strategic relationship with Deutsche Bank, which has a 19.9% shareholding, and employs over 400 staff across offices in Sydney, Brisbane, Melbourne and a number of regional centres.

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