



Above and beyond for our clients

Revealing the results of our
independent client survey

Canaccord
WEALTH

Earning your trust

How can you be sure you've found a reliable wealth manager? To give you confidence, we asked an independent company to survey thousands of our private clients. We're proud to share the highlights with you – evidence that we're committed to going over and above and beyond for you every day.



18,000

clients invited to take part



2,000

respondents



92%

satisfaction rate

If you'd like to learn more about us, our services, or the survey itself, we'd be delighted to hear from you at enquiries@canaccord.com.



Overall satisfaction

We asked our clients how satisfied they are with their overall experience of Canaccord Wealth. Almost everyone who responded (92%) stated that they were satisfied with our service, while over 65% said they were very satisfied.



In their words

Your wealth manager should take care of you, treating you and your wealth with respect, professionalism and expertise. Service consistently came out as something our clients are looking for and that we deliver.

“I have always been confident that they have my best interests at heart.”

“A personal service and excellent understanding.”

“Always receive a first-class service.”

“I have been with Canaccord for some 17 years and can honestly say that it was the best thing I have done as far as guidance of my financial affairs has been concerned. Their professionalism and reaction to issues that have arisen in that period have been exceptional.”

“I feel my investments are safe.”

Clear communication

We know how important it is to feel in control of your finances. As your wealth manager we keep you up to date on your portfolio and check in as regularly as you like.



85%

say we provide clear and concise information about their investment performance

In their words

“Honest assessment of performance.”

“Succeeded in producing maximum returns.”

“My Investment Manager is brilliant. I knew nothing about financial investing and he has simplified the process and made it both interesting and easier to understand.”

“They manage to make the confusing financial world very easy to understand. They put everything into a language I find easy to follow. It's always a pleasure to speak with them.”

“My portfolio has done very well, even in difficult times.”

How we keep you informed

- **Direct communication** with your Investment Manager by phone, video call, in-person meetings, or email
- **Market outlooks** and quarterly performance reports with detailed commentary
- **Webinars** to keep you updated on the economic and investment outlook, while answering important client questions
- **Online portal** access to monitor your investments whenever you like.

Responsive to your needs

Life can be unpredictable and with challenges. Circumstances change. We're committed to supporting you through all of them, whether it's making a difficult situation more manageable, or making the most of an inheritance.



84%

feel we handle their queries and concerns to their satisfaction

In their words

“No problems in 30 years.”

“I have known my current Canaccord contact for many years, and his father before him.”

“I do not get too involved in my investments since my husband died in 2016, so I rely on you completely.”

“I inherited a Canaccord Wealth Investment Manager when my mother died. They have done a fantastic job for me, and I count them as a friend.”

“I feel like I have a very personal service. I feel supported in an area I find overwhelming.”

Transformative wealth planning

For those clients who use our wealth planning services, the overwhelming majority who responded report being either satisfied or very satisfied. 78% of clients who responded say they work with us exclusively.



88%

satisfied or very satisfied
with wealth planning

In their words

“I am now retired and Canaccord Wealth’s advice over the years has enabled me to feel financially secure.”

“Canaccord Wealth does well when compared to two other wealth managers I have dealt with.”

“I always receive a first-class service. I like the way we communicate with each other, and we get the best result by doing this. I always feel like [Canaccord Wealth] has time for me.”

The survey was undertaken independently by Savanta during February-March 2024, with results reported in April 2024. A 12-to-15-minute online questionnaire was sent to 18,721 private clients and was completed by 2,221 clients, 1,918 in the UK and 303 international clients. The quotes in this document are genuine quotes from clients, which have been anonymised and non-attributed for confidentiality reasons (such as using ‘Investment Manager’ to replace an account executive’s name).

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Ready to talk?

Your opinions matter a great deal to us and drive us to deliver a best-in-class client experience. Whether we're supporting you with wealth planning, investment management or overall wealth management, we'll continue finding new ways to help you enjoy your wealth to the fullest.

If you're a client

Have we made a difference to your finances? If so, we'd be delighted if you could refer a loved one, colleague or friend to Canaccord Wealth.

If you're new to us

Get in touch with us and we'll offer a free, no-obligation chat to see how we can help you.

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Adam & Company

We are part of Canaccord Genuity Group Inc. and thanks to our relationship with Canaccord Wealth, investing with us gives you access to a broad range of wealth management solutions.

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