THE FINANCE COUPLE™
TWC WEALTH MANAGEMENT

A Financial Advisor's Report Card

September 2019

"To avoid criticism – do nothing, say nothing, be nothing." – Elbert Hubbard

Once again, it's that time of year where we use the monthly newsletter to solicit your input and constructive criticism. Please excuse the annual repetitiveness, but we learned long ago that we should never be shy about asking our clients what you think of the advice and service we provide you.

Although we pride ourselves on knowing our clients very well, we'd be mistaken if we did not solicit your input periodically. And, especially when we are at possible highs in the markets, we like to seek your perception of your risk tolerance.

As always, please remember that these report cards are not immediately actionable. In other words, we do not change anything simply because someone indicates that they feel like they are over- or under-weight in stocks or bonds. Instead, we use the input to begin a more in-depth dialogue with that particular client as to whether or not a change needs to be made.

As we've said many times before, your comfort is extremely important, which is one of the many reasons we stay in contact with you on a more consistent basis. This contact, whereby we review and solicit pertinent information, is the basis for our comprehensive advice: the more we know about you, the better advice we can provide. In turn, we hope that this consistent contact not only helps keep our advice relevant, but also helps educate and possibly reassure during the good times and bad. And selfishly, we want to provide a service that you have no hesitation in recommending to others.

So, please fill out the report card on the flip side of this page and return it in the self-addressed stamped envelope, or feel free to scan/email it to us at TheFinanceCouple@lpl.com. And, as always, thank you very much for your friendship and trust - as well as your input!

Tim & Wynne Curran

R. Timothy Curran, JD, CFP® tcurran@lpl.com (704) 499-9703
Wynne B. Curran wcurran@lpl.com (704) 499-9704

Name(s): ____ Date_________________

E-Mail Address: ____

1. Please evaluate our overall service.

   Excellent / Good / Neutral / Poor / Very Poor

2. Please evaluate the overall financial advice rendered.

   Excellent / Good / Neutral / Poor / Very Poor

3. Do you feel that you are overweight or underweight stocks?

   Underweight / Neutral / Overweight

4. Do you feel that you are overweight or underweight bonds?

   Underweight / Neutral / Overweight

5. I would like to take more risk to potentially capture a higher portfolio return.

   Agree / Neutral / Disagree

6. I am comfortable with the amount of volatility in the portfolio over the past twelve months.

   Agree / Neutral / Disagree

7. I am comfortable that all of my financial concerns have been addressed, including long term care.

   Agree / Neutral / Disagree

8. I receive a sufficient level of contact during the year (in the form of personal calls and emails).

   Agree / Neutral / Disagree

9. I feel confident that if I call with a question, it will be answered in a timely fashion.

   Agree / Neutral / Disagree

10. What do you like best about the firm?

    ____

11. What do you think we could improve upon?

    ____

12. What specific issues would you like to work on during the next twelve months?

    ____

Please offer any additional comments below (if needed, please add an extra sheet of paper).

____

____

If you are inclined to refer someone, please note their name, number and/or e-mail below.

____

www.TheFinanceCouple.com

1422 S. Tryon Street, Ste. 300, Charlotte, NC 28203