THE FINANCE COUPLE™
TWO PERSPECTIVES WITH ONE FOCUS... YOU

A Financial Advisor's Report Card

September 2024

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

It's that time of year again, time to ask for your candid input. Although the markets are performing well so far this year, we never know what is around the corner. Accordingly, as financial planners rather than just investment managers, we are constantly looking to get ready for good times and bad, in good times and bad, as well as advise you on any aspect of your life that has to do with finances. Further, again regardless of the economy and the markets, we will always seek to remain independent and comprehensive advisors - offering advice, management, and service that is hopefully exceptional and free of emotion.

We believe that part of providing good service is constantly seeking to improve, as well as seeking input from the ones who matter most; in this case, that would be you, our clients. Thus, we want to know if *you* believe we are advising and servicing you well. And though we pride ourselves on knowing each of you very well, we'd be remiss if we did not solicit this input from you periodically. Further, regardless of whether the markets and economy are doing well or poorly, we always want to take your pulse periodically to make sure we are within your risk tolerance level.

Please remember these report cards are not immediately actionable; we do not change anything simply because someone indicates that they feel like they are over- or under-weight stocks or bonds; instead, we use this input to begin a dialogue to see if any allocation or financial planning changes actually need to be made.

This report card is also just another way that we stay in consistent contact with you; our phone calls and solicitation for your input are a crucial part of our comprehensive advice and service - the more we know about you, the better our advice. And last but not least, we want to make sure we are providing a service, in good times or bad, that you have no hesitation 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, your trust, and your referrals – and thank you for your input!

Tim & Wynne Curran

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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).

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

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