



Above and beyond

At Canaccord Genuity Wealth Management (CGWM), you and your wealth are at the heart of everything we do. But don't just take our word for it – we think our clients say it best.

We invited approximately 10,000 of our private clients to take part in a short online survey to find out all about their experience of using CGWM. Just over 12% completed the survey and we are very pleased to share some of the highlights.

Investment involves risk. The value of investments and the income from them can go down as well as up and you may not get back the amount originally invested. Past performance is not a reliable indicator of future performance.

The information contained herein is based on materials and sources that we believe to be reliable; however, Canaccord Genuity Wealth Management makes no representation or warranty, either expressed or implied, in relation to the accuracy, completeness or reliability of the information contained herein.

We're extremely proud of the results. Below is a snapshot of just some of the survey results from our UK-based clients; if you want to find out more about the survey, or anything else about CGWM and the range of services we can offer you, we'd be delighted to hear from you:

92% of our UK clients say they're satisfied* with their experience of CGWM overall

96% are satisfied with their main contact at CGWM

96% agree that their main CGWM contact is easy to get hold of

95% say their main contact is knowledgeable about the services CGWM offers

92% agree that their main contact gives them quality advice

92% agree that their main contact takes ownership of issues and sees things through

As well as portfolio investment management, we offer a range of financial planning services, which are also highly rated by our clients who use them:

89% of UK clients who use our financial planning services are satisfied with them

As a CGWM client, you can access your portfolio online 24/7 through our Wealth Online platform. We're happy that our clients who use Wealth Online see it as a useful way to access their portfolio valuations:

86% agree that using Wealth Online gives them access to their up-to-date portfolio valuation

It's not just our clients who rate us highly; we have a five-star rating from independent experts Defaqto, and we were voted the Wealth Management Company of the Year in 2021 at the City of London Wealth Management Awards.



What our clients say about CGWM:

A successful experience, with the close attention of a consummate and helpful professional.

The two things I want are trust, based on the personal relationship with the (Portfolio) Manager and reasonable performance. Both of these have been achieved.

Very satisfied with the advice and the growth of the fund.

Excellent advice and service from a knowledgeable and attentive client adviser.

*'Satisfied' is denoted as a rating of 7 or higher out of 10, on a scale of 0-10.

'Agree' is denoted as a rating of 7 or higher out of 10, on a scale of 0-10.

Survey overview note: we sent survey invitations during March - April 2021 to 10,588 of our private clients to complete a 12-15 minute online survey on their experiences of using CGWM. 1,291 completed the survey, a response rate of 12.2%. 1,042 (81%) of our clients who responded had UK-based accounts, and 249 (19%) had accounts based internationally.

How can we help?

If you'd like to know more about our survey or any of our services, please get in touch with your CGWM Investment Manager. They'll be happy to answer your questions and provide more details of all our services.

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Guildford
Lancaster**

**Llandudno
London
Newcastle
Norwich**

**Southampton
Worcester
York**

canaccordgenuity.com/wealth-management-uk

Important information

Investment involves risk. The value of investments and the income from them can go down as well as up and you may not get back the amount originally invested.

The investments described in this brochure may not be suitable for all investors. Investors should make their own investment decisions based upon their own financial objectives and financial resources and, if in any doubt, should seek advice from an investment adviser.

This document is for information only and is not to be construed as a solicitation or an offer to purchase or sell investments or related financial instruments. This has no regard for the specific investment objectives, financial situation or needs of any specific investor.

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