

# Client value survey

## The rating scale

Think about the services you currently receive from your financial adviser.

Please rate each of the following statements according to how valuable this service is to you.

Financial value	Not valuable		Somewhat valuable		Very valuable
1. It is important to me that my financial plan is continually monitored and updated.	1	2	3	4	5
2. My financial adviser should approach me regularly and proactively about my finances.	1	2	3	4	5
3. I want to know exactly what fees I pay my investment adviser.	1	2	3	4	5
4. It is important to me to have online access to my account around the clock.	1	2	3	4	5
5. I need a financial plan that offers me financial freedom.	1	2	3	4	5
6. It is important to me that my surviving dependents are supported in making financial decisions after my death.	1	2	3	4	5
7. I want to feel completely secure about my finances, even in times of declining markets.	1	2	3	4	5
8. I want to protect myself from unexpected events that could have a negative impact on my investments.	1	2	3	4	5
9. I need a tailor-made financial plan that covers more than just my investments.	1	2	3	4	5
10. I would like to expand my knowledge of investments and private financial planning.	1	2	3	4	5
11. I need a neutral third-party to moderate discussions about finances between me and my spouse/partner/family member.	1	2	3	4	5
12. It is important to me to protect my financial wellbeing in the event that I become less able to make decisions at an older age.	1	2	3	4	5

The value of investments, and the income from them, may fall or rise and investors may get back less than they invested.

Emotional value	Not valuable		Somewhat valuable		Very valuable
1. I want a personal relationship with my financial adviser.	1	2	3	4	5
2. I need the perspective of an expert to help me with all my important decisions.	1	2	3	4	5
3. I want to feel that I am in control of my financial future.	1	2	3	4	5
4. I want to feel that I am well on my way to achieving my financial goals.	1	2	3	4	5
5. I need to feel confident that my goals are my top priority for my financial adviser.	1	2	3	4	5
6. My adviser gives me confidence, educating and guiding me during times of euphoria and turmoil.	1	2	3	4	5

Portfolio value	Not valuable		Somewhat valuable		Very valuable
1. I would like to be fully informed about changes in my portfolio.	1	2	3	4	5
2. I would like to maximise my investment returns, even if this means that my portfolio is exposed to the risk of significant losses in value.	1	2	3	4	5
3. I need the security of guaranteed income in retirement and am willing to forego revenue for this.	1	2	3	4	5
4. My portfolio has been aligned to my overall financial goals and values.	1	2	3	4	5
5. My adviser proactively manages and monitors my portfolio, making adjustments whenever necessary.	1	2	3	4	5

Time value	Not valuable		Somewhat valuable		Very valuable
1. My financial expert is available to me whenever I need them. I can spend time on things that are important to me.	1	2	3	4	5
2. My financial adviser is able to explain their investment decisions relating to my portfolio to me in easy-to-understand language, so I don't have to spend time becoming an investment expert.	1	2	3	4	5
3. Focusing on long-term financial goals with my adviser has saved me time and reduced my financial stress.	1	2	3	4	5

## Investment risk information

The value of investments, and the income from them, may fall or rise and investors may get back less than they invested.

For further information on risks please see the "Risk Factors" section of the prospectus on our website at <https://global.vanguard.com>.

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