

Client report



P&B Wealth

Once viewers have completed a Money Alive box set they are given the option to complete an anonymous survey about their experience. We thought you would be interested in the results from your own clients to give you a sense of how the service is being valued by them. This data is based on their responses over the period from April to October 2020.

Results from your 26 respondents

8.7/10

is the average score your clients gave to their Money Alive experience

88.5%

of your clients agreed they were now better informed ahead of their advice meeting with you

92.3%

of them agreed Money Alive is a valuable addition to the advice process

96.2%

of clients valued you giving them access to Money Alive

NEW Feature: Custom Next steps screen

You can now add your own 'Next steps' links at the end of your client's video journey. Drive clients to web pages, adviser calendars, documents, forms, surveys, online fact finds etc

Best of all these actions are recorded and evidenced on your client reports and downloadable CSV.

Talk to your Money Alive contact for more information.

