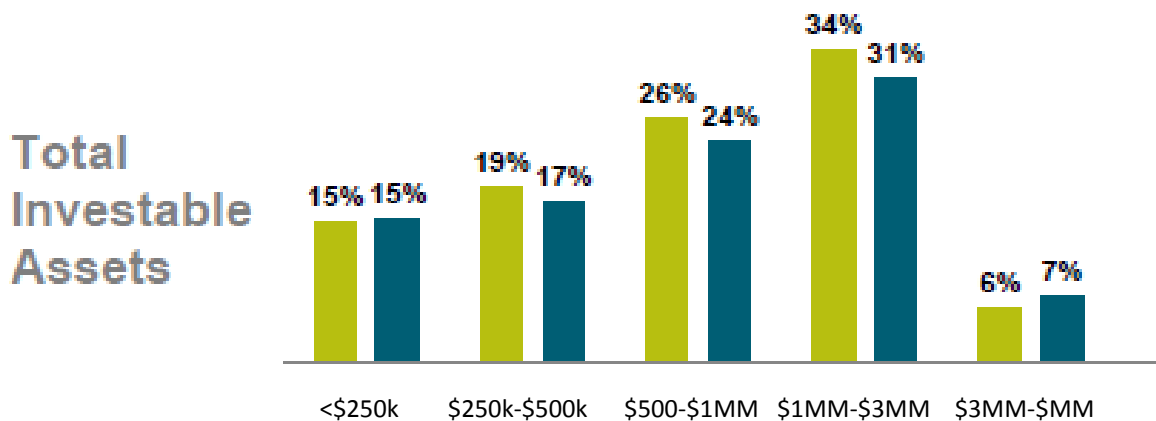
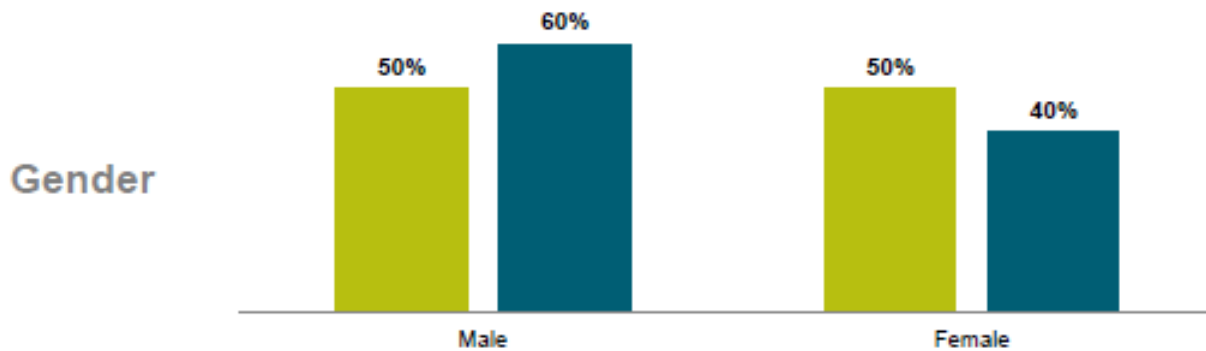


Earlier this year we participated a comprehensive client survey program sponsored by Dimensional Fund Advisors. Sincere thanks to all who took the time to respond. The goal of the survey was to better understand what is most important about our relationship from your perspective and to get objective, anonymous feedback about the job we are doing for you. Our survey results were also compared to the results of almost 19,000 respondents from other independent advisory firms who use DFA funds in their core business model. This provided important insights regarding the services we are providing and how we are doing in delivering those services. The results were both helpful and encouraging, and we hope to continue to use this information to constantly elevate the value of the services we provide you.

In summarizing some interested results from the survey, 98% indicated they are comfortable referring us to their friends, loved ones and co-workers; however, only 56% referred someone over the previous 12 months. Additionally, virtually all of the respondents indicated the referral was a “mention” during a conversation with no email or personal introductions. Hopefully the new website can help remedy some of this “disconnect!” We also found that in spite of the constant drumbeat of negative news about professional financial advisors the media, both our clients and those of similar firms were overwhelmingly satisfied with their client/advisor relationship.

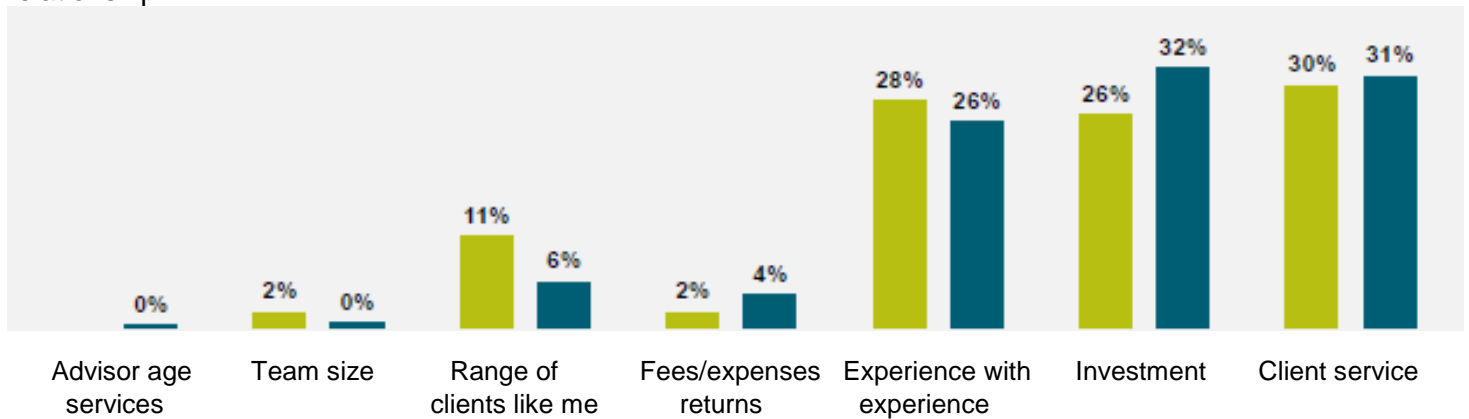
Below we will share some of the results from the survey comparing **our client responses (in green)** with the total responses from **all participating firms (in blue)**. Although the survey was more detailed and involved than what is illustrated here, below are some of the more important highlights from the study. If you have any questions, or would like to discuss ways in which we can improve our services on a more personal level, please let us know!



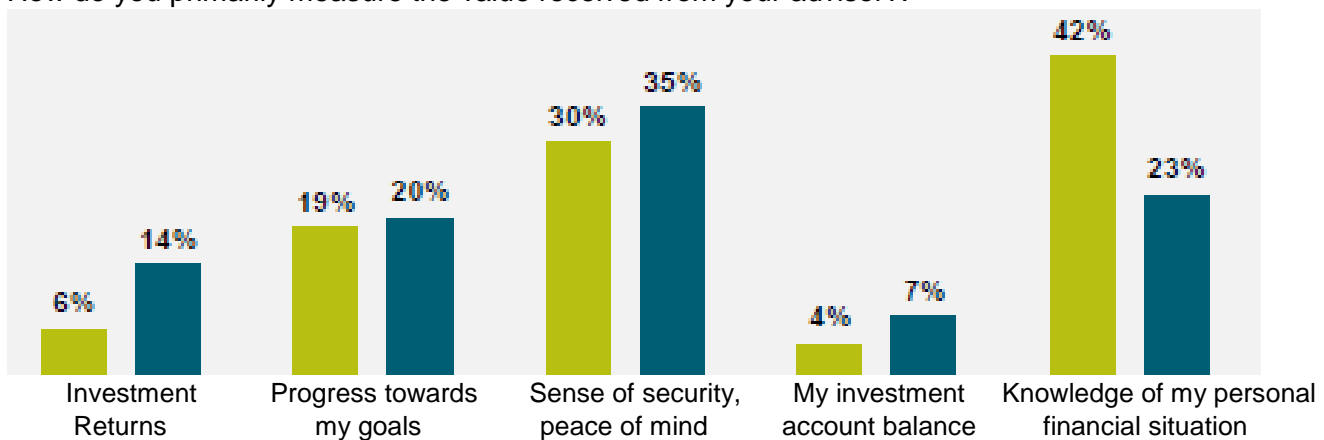
How satisfied are you with your advisor in the following areas? (Average rank, 7 being most satisfied)

Professionalism of the team		Responsiveness to questions and requests		Ability to communicate effectively		Understanding my needs and goals		Keeping me informed on progress toward my goals		Providing services that help me pursue my goals	
6.9	6.7	6.9	6.7	6.8	6.7	6.7	6.6	6.4	6.4	6.5	6.4

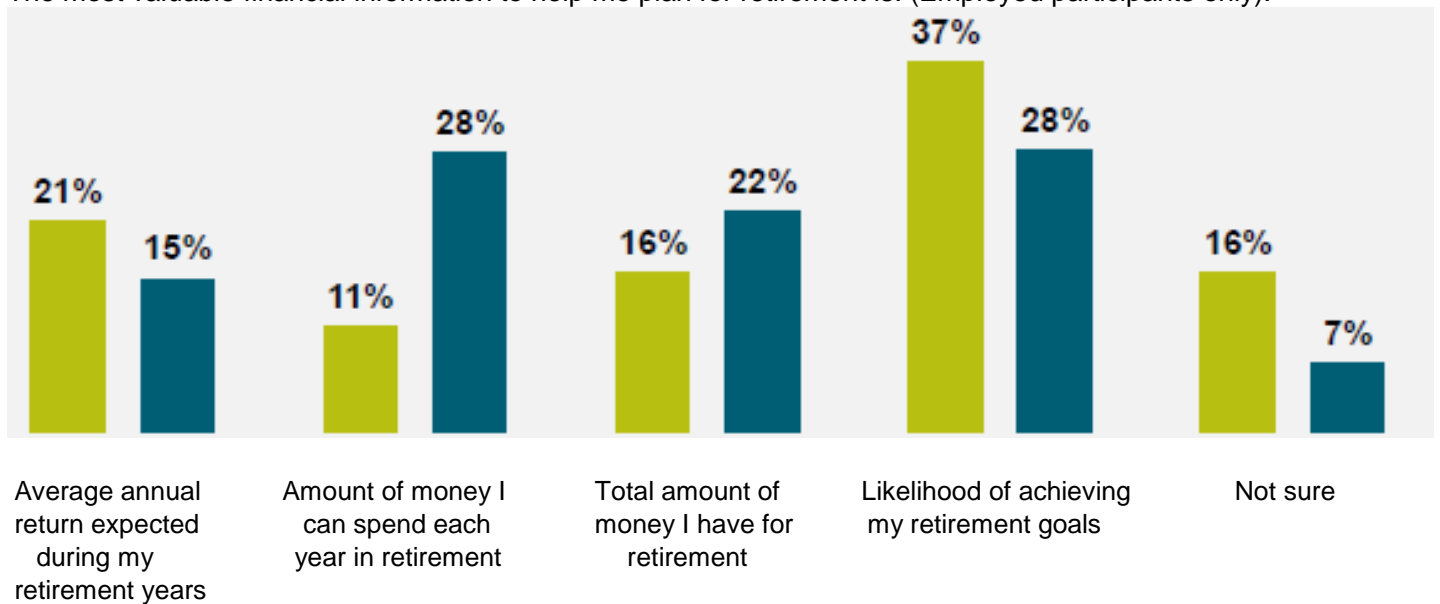
From the following, choose the attribute you consider most important in your advisor relationship:



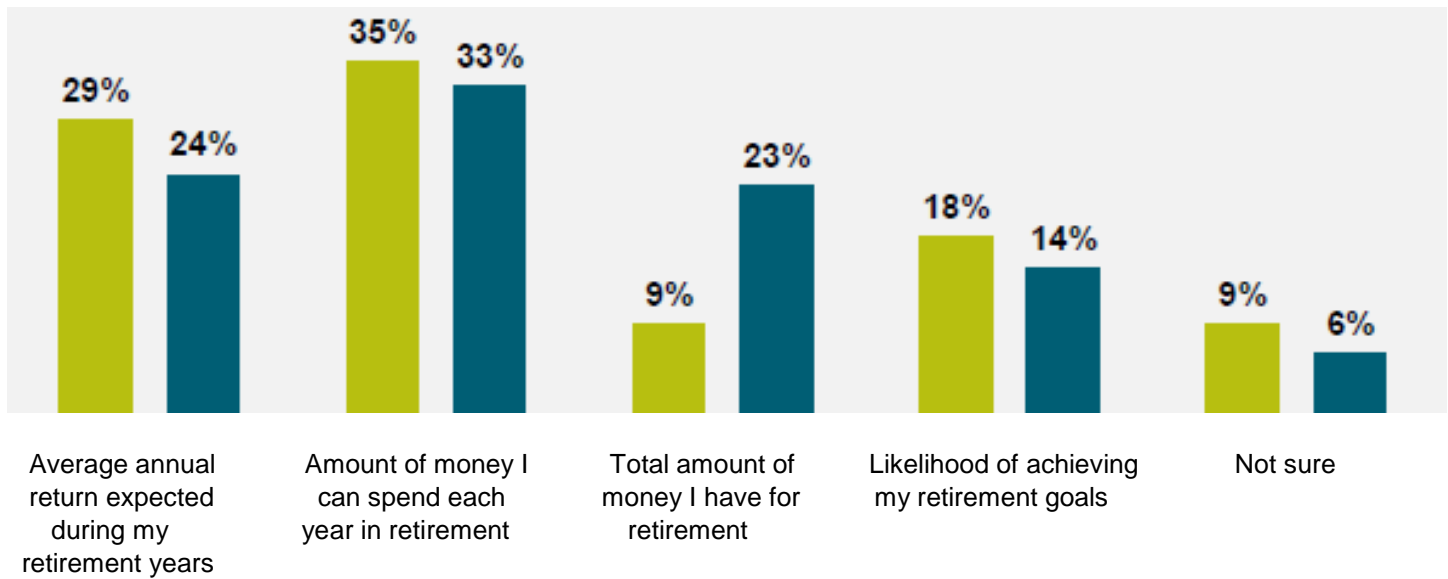
How do you primarily measure the value received from your advisor?:



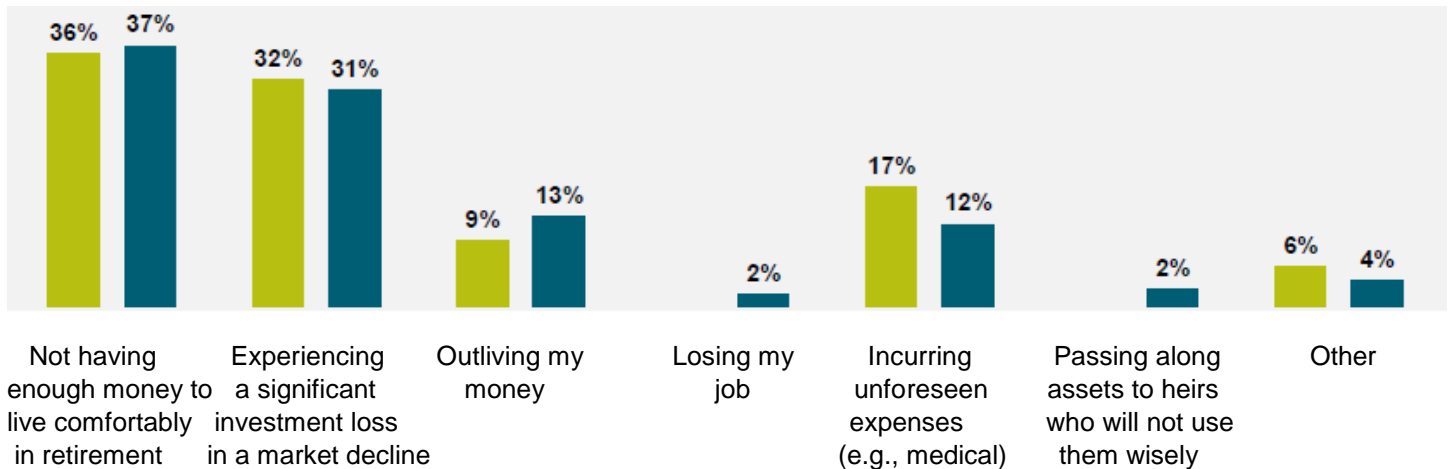
The most valuable financial information to help me plan for retirement is: (Employed participants only):



The most valuable financial information to help me during retirement is: (Retired participants only):



My greatest fear about my personal finances is:



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