

96% Client Satisfaction

As part of the Appleton Group Wealth Management's effort to become one of Wisconsin's first Certified Fiduciary Advisers under the 2006 Pension Protection Act, the firm participated in an in-depth survey, conducted by DALBAR, Inc., to determine overall client satisfaction. The firm's results are in the blue shaded boxes below:

	DALBAR Designation	Score* (Max is 4.00)	Percent of Clients Giving Top Score** (Perfect 4.00)	Percent of Satisfied Clients*** (3.00 or better)
Trust of Professional	Very Good	3.52	56%	96%
% of participants (financial professionals) with equal or better ratings	18%	16%	15%	23%
Financial Performance	Very Good	3.45	49%	96%
% of participants (financial professionals) with equal or better ratings	74%	36%	33%	46%
Satisfaction with Services	Very Good	3.63	65%	99%
% of participants (financial professionals) with equal or better ratings	58%	25%	26%	39%
Quality of Advice	Excellent	3.76	76%	100%
% of participants (financial professionals) with equal or better ratings	33%	28%	29%	51%

**Score" is based on a 4-point scale, with 4.00 being the highest achievable score.

***Percent of Clients Giving Top Score" shows the percentage of the professional's clients gave the professional the highest score (4.00 out of 4.00) in a category.

****Percent of Satisfied Clients" shows the percentage of the professional's clients that indicated that they were either "Very Satisfied" or "Satisfied" with the professional's service in a category (gave the professional a score of 3.00 or higher).

DALBAR Certifications are issued to financial professionals who meet the criteria of having five years of experience, no disciplinary sanctions by certain regulators for five years, and are active practitioners. Financial professionals pay DALBAR a fee to obtain a rating of performance from clients. DALBAR, Inc. issued the ratings in 2007 after conducting surveys for 2,545 professionals. DALBAR ratings are not representative of any one client's experience and are not indicative of future performance.

Now is the time to have a conversation with
Appleton Group Wealth Management

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