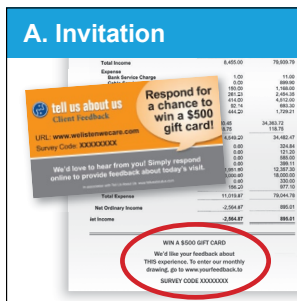


What is the *Client Retention Program*™?

The *Client Retention Program* is an automated client feedback system. Upon interaction with an advisor, clients are invited to rate and comment about their experience. With the experience captured, advisors have access to a powerful online reporting suite that displays up-to-date results of all responses and provides real-time access to client comments. There are numerous features that enable you to view, share, benchmark and respond to your client feedback.

A win for you and a win for your clients.

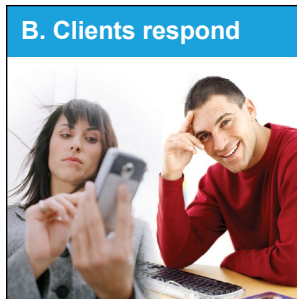


By understanding and addressing Client Feedback you increase your chance of client satisfaction, loyalty and ultimately wallet share. The *Client Retention Program* empowers your clients establishing a direct line of communication for immediate resolution to significant issues. Short term, the immediate feedback allows you to individualize your client approach, and over time to benchmark your performance to the rest of our industry.

How It Works:

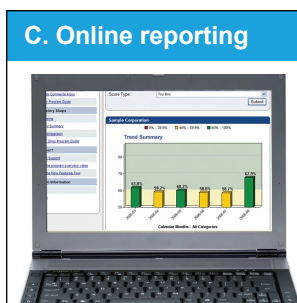
A. Invitation to provide feedback

There are several ways to invite your clients to respond: by emailing an invitation, printing invite info on statements, or by hand-distributing or mailing out an invitation card to your clientele.



B. Clients respond via web

We provide a dedicated web address for the *Client Retention Program*. Clients can respond 24/7 at their convenience. The survey takes 5-7 minutes and includes satisfaction ratings and open-ended comment opportunities.

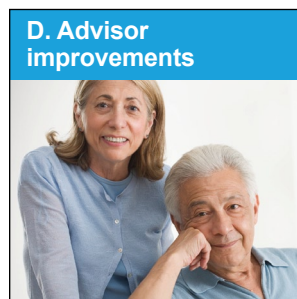


C. Online reporting of ratings and comments

To manage the survey responses, log on to the Online Knowledge Management Console (the KMC). This award-winning, web-based reporting site is accessible 24/7 to your management. Client comments are available instantly and survey results are updated daily. Derive key insights and conclusions from the variety of reporting options and formats available.

D. Action taken leads to profitable improvements

The *Client Retention Program* take the guesswork out of determining client satisfaction. The detailed survey ratings and comments enable you to take specific action on the results. This leads to key operational improvements, plans for development, motivation, and increased client loyalty.



“The paradigm has shifted – being a great relationship builder is not enough. To be at the top today, you need to master the art of business.”

Norm Trainor, CEO, The Covenant Group

Included in the *Client Retention Program*

- **Unlimited responses**
- **24/7 reporting access**
- **Drawing for \$500 gift card (participation incentive)**
 - Conducted and funded by The Covenant Group from among all participating advisors
- **Award-winning online reporting site – available 24/7**
 - Dedicated login for each advisor and company management
 - Numerous reports for tracking survey results and comparing locations
 - Real-time open-ended feedback from respondents
 - Pre-written templates for responding to complaints, praise, suggestions
- **Toll-free telephone and email support**

Clients rate their experience

Dimensions include:

- *Overall satisfaction*
- *Knowledge of products*
- *Service delivery*
- *Advisor courtesy, availability*
- *Timeliness of information*
- *Loyalty to advisor*
- *Client comments*
- *Uncover upsell opportunities*
- *Referral business/lead gen*

What will the *Client Retention Program* do for you?

- Retain clients and client spend (investment)
- Diminish client churn/defection
- Recover dissatisfied clients
- Ensure resolution consistency
- Capture and store client information for marketing programs and/or consumer panels
- Identify new sales opportunities

The Covenant Group can help you create loyal clients.
If you don't, somebody else will.

Fees

\$588 per year per advisor (**\$49/month** with secure credit card payment)

\$50 one-time set-up fee per location

Visit www.clientsfeedback.com to get started today!

It's easy to implement. In just a few simple steps, you can be getting valuable feedback from your clients.

For questions, call toll-free: 1-866-860-8828