

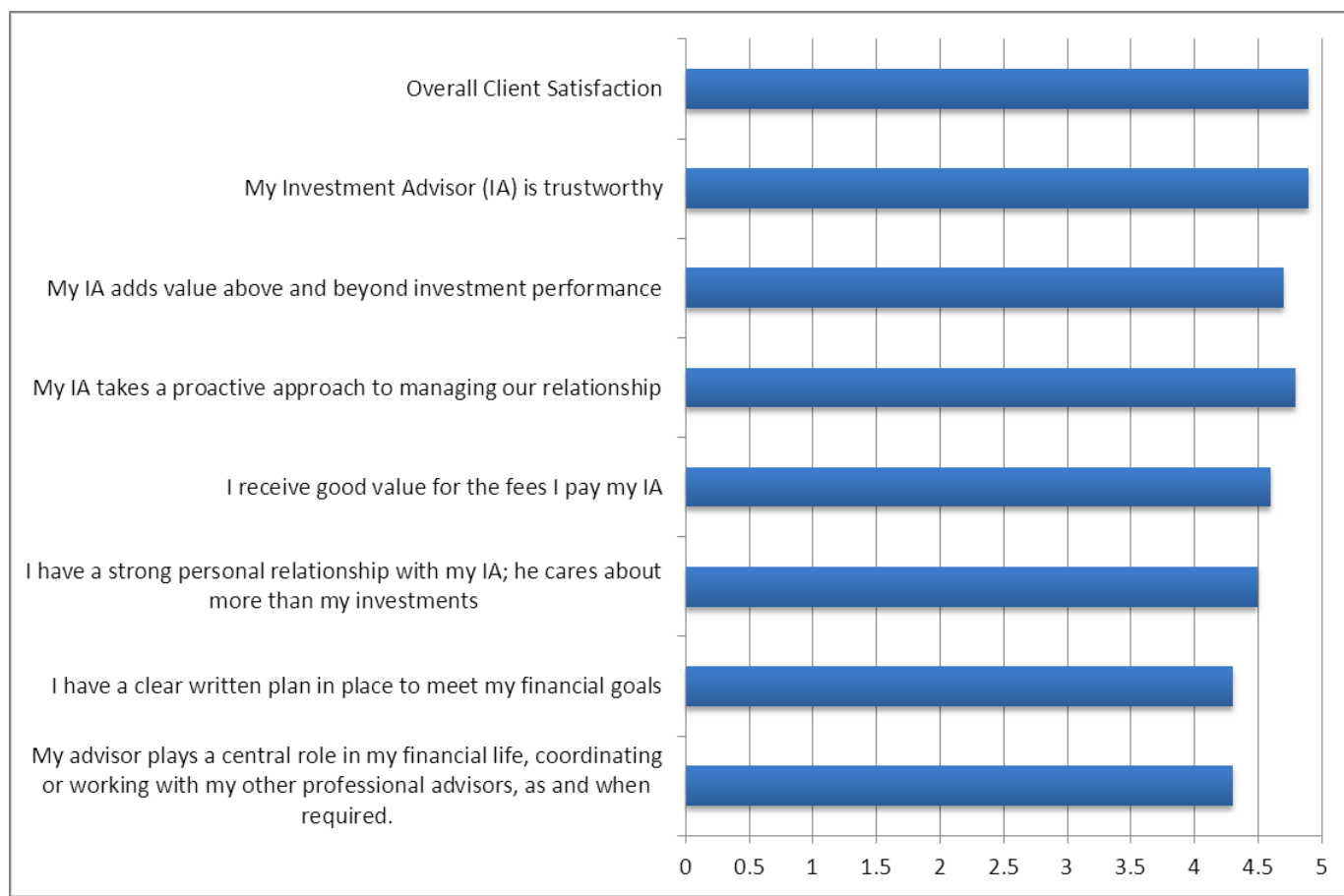
Survey Results

March 2015

We are writing to you today to share with you the results of a client satisfaction survey we conducted in November 2014 using an independent consulting firm.

The goal of the survey was to gain a better understanding of our clients' needs and to ensure that our service levels meet or exceed expectations. We received excellent feedback and are encouraged that our overall satisfaction rating of 4.9 (out of a possible 5.0), is 23% above the industry average*. You have our promise that we will continue to work very hard to ensure we deliver a superior client experience.

The following is a summary of ratings of the top categories as indicated by our clients (all scores out of a possible 5.00).



* Report published by Advisor Impact February 2013.

Industry average is based on 1,018 investors who were surveyed in Canada in October 2012.

In addition to receiving feedback on our service levels, we also gained insight into how we should expand our offering and more importantly, how we can increase our value to you. We learned that our clients want more detailed and dynamic information on the following:

- ❖ Tax Planning
- ❖ Support in facilitating family discussions around estate planning
- ❖ Enhancing delivery of Quarterly Reviews to include a Comprehensive Wealth Planning Overview

In the recent months we have made changes to our service offerings in order to incorporate the above:

- ❖ Weekly newsletters, topics ranging from tax planning, retirement planning, behavioural finance plus our market updates
- ❖ Offering Quarterly reviews at a location convenient for you or online via GoToMeeting. We need to deliver comprehensive meetings even if we are not able to meet you in person.
- ❖ New presentation materials focused on what you prioritize as most important and would like to understand better.

Thank you to everyone who completed the survey. Our response rate (69%) was 30% higher than the average for this program*. It is indeed an honour that you choose to work with us to realize your financial goals.

We are truly grateful for all your feedback and giving us the opportunity to grow.

Sincerely,

Robert, Allison & Sahar

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