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Mar. 14, 2019

[1st Global](#), an independent wealth management partner to exceptional CPA wealth management firms and financial advisors, has announced the results of its bi-annual Voice of the Advisor survey showing high marks for advisor satisfaction.

Survey data shows that more than 97 percent of respondents are satisfied with the overall service and support 1st Global provides their firm and more than 97 percent of respondents stated they would recommend affiliating with 1st Global to another financial advisor or CPA firm.

“The financial services industry, and the services and technologies our clients demand, are changing so rapidly, relevant and timely feedback from our clients is critical,” says 1st Global President David Knoch. “Importantly, service excellence is the foundation for exceptional partnership and support, and we are gratified to have our affiliated firms acknowledge our strong performance.”

At a departmental level, 1st Global’s service and support was praised across the board. Each of the nine departments measured came in at or near all-time highs in terms of advisor satisfaction. Notably, the Service and Operations Group, which realigned into cross-functional, end-to-end service teams last year, earned a 97 percent satisfaction rating – its highest on record.

“I’m so proud of the work our Service and Operations Group has put in to enhance the client experience we deliver,” 1st Global Assistant Vice President of Operations, Service and Capital Markets Bob Jansen said. “We’ve been able to increase our service

levels and decrease our processing turnaround times to some of the best in the

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the affiliate CPA firms and financial advisors the company serves, the Voice of the Advisor survey is conducted twice each calendar year. The survey measures all points of partnership with 1st Global from satisfaction with key business units, capabilities and resource partners, as well as provides an opportunity to uncover insights into the specific challenges of CPA wealth management firms and what the vision is for the future of their firms.

The latest edition of the Voice of the Advisor survey also revealed some unique insights into the challenges facing CPA wealth management firms. Selecting from a list of industry-wide challenges, respondents identified their top five challenges as the following:

1. Keeping pace with technology changes
2. Finding qualified clients and prospects
3. Effectively leveraging technology within my firm
4. Effectively utilizing data to improve practice management, client experience
5. Deliver a consistent client experience

“The value of this survey isn’t just a high advisor satisfaction score. By following up on all areas where we can improve, a commitment made by all of our departmental leaders, we gain valuable performance insights and demonstrate personal accountability. These qualities are what makes 1st Global different and enables us to continue providing exceptional service to our advisors,” says Knoch.

Firm Management • Technology

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