

Investment Quorum receives first ever 3 Star Investor in Customers award

27th July 2007

Investment Quorum, the award winning* City based micro-boutique Wealth Manager has announced that it has been awarded the first ever **3 Star Investor in Customers Award**.

The Investor in Customers assessment is an independent service which assesses and recognises companies in all business sectors for their customer focus in four key areas:

- understanding customer needs
- meeting customer needs
- delighting customers
- developing long term relationship with customers

The above four principles are each broken down into four themes covering a wide range of criteria such as communication, product quality, treating customers fairly and the willingness of customers to recommend to others. Each of these themes is separately assessed through desk, customer, senior management and employee research. In IQ's case the customer research was conducted with both staff and clients of the company.

Assuming an award is warranted there are three levels of recognition by IIC – one star for meeting a satisfactory level, two stars for outstanding performance and three stars for exceptional performance. Investment Quorum has been awarded **Three Stars** in recognition of our clear demonstration of commitment to their customers and we are now very proud to be able to use the 'Investor In Customers' three star logo on all marketing material.

Lee Robertson, CEO of Investment Quorum said:

"We are delighted to be the first independent Wealth Manager to receive an Investor in Customers award, particularly in the 3 Star category. As an organisation, we pride ourselves in the high levels of service we offer our clients and it is gratifying to receive independent confirmation of those services. We constantly prove that as a small but highly-responsive organisation we are able to compete at least on equal terms with many of the larger well known wealth management organisations. What makes this award so satisfying is the fact that it is awarded based primarily upon the responses supplied by our clients. Gratifying as they are, we will continue to strive for excellence in all aspects of our advice and investment management services and adhere to the FSA's Treating Customers Fairly initiative."

Neil Craig, Managing Director of Investor in Customers commented:

"This is an amazing achievement by Investment Quorum. We have deliberately set the bar high for three stars because we're looking for true excellence and the

study shows that Lee and his team are delivering just that. After each assessment we prepare a dashboard covering the 16 metrics we measure and use red/amber/green to show at a glance how a company is performing. For the first time, it was awash with green. So hearty congratulations to Investment Quorum, they've certainly set the pace in the sector."

Further details on Investment Quorum can be found at www.investmentquorum.com and for Investor in Customers at www.investorincustomers.com.

About Investment Quorum

We provide an independent, comprehensive wealth management service, inclusive of discretionary investment management, for wealthy individuals, entrepreneurs and trustees on a 'whole of market' basis. We prefer to work on a fee basis when dealing with client's affairs.

We are a 'boutique' organisation, meaning we intentionally remain of modest size but deliver highly specialised and tailored advice. All IQ advisers are committed to extremely high standards. We are very well qualified by industry standards and are constantly seeking to acquire greater knowledge to assist in our day to day activities and within our own specialisations and areas of interest.

Contact between investment and product providers and IQ is extremely close and we constantly review fund managers and their offerings for relevance, performance and charging.

We are advocates of 'open-architecture' or wrap platforms thus ensuring that we can deliver high-end financial solutions unfettered by any insurance or pension company bias. We truly believe that open-architecture is the intelligent way to approach wealth management. It allows us to negotiate extremely competitive entry charges from fund managers and product providers thus giving our clients the competitive edge required in wealth accumulation.

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* Highly Commended Category – 2006 Gold Standard Awards

About Investor in Customers

- We carry out independent assessments for businesses to establish the strength of their customer relationships and offer awards for customer service excellence at three levels.

- Our methodology is based on Frederick Reichheld's 10 year research study in the USA which showed that companies committed to customer loyalty outperform their competitors for profitability. Critically, our research findings give clients meaningful business insights as well as the IIC award.
- We take direct on line feedback from customers, staff and senior management, supplemented by independent desk research, against 16 metrics and establish how well companies:
 - Understand their customers' needs
 - Deliver products and services that meet those needs
 - Deliver 1st class service
 - Engender loyalty (in customers and staff)

In this way, we measure both the internal and external perspective against the same metrics to give a unique insight into business performance.

For more information, please check our website www.investorincustomers.com or email enquiry@investorincustomers.com or call 01395 513330.