



City based boutique wealth manager wins prestigious award

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Investment Quorum, the award winning City based micro-boutique Wealth Manager announces 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 ow 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 coveted 3 Star category. As an organisation, we pride ourselves on 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 on at least 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 these comments 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."

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