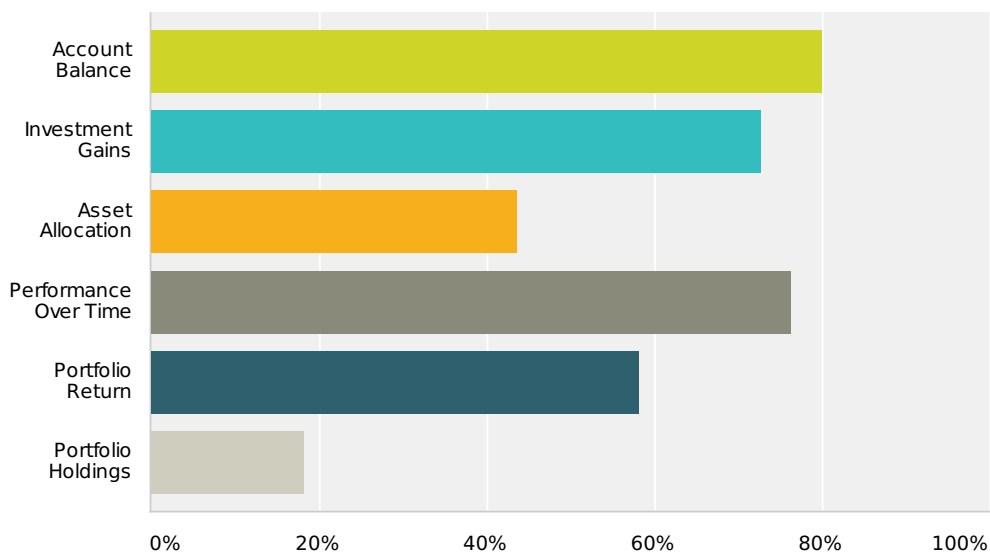


Q1 What are the most important items on the quarterly statement you receive from Rockbridge? (Select all that apply)

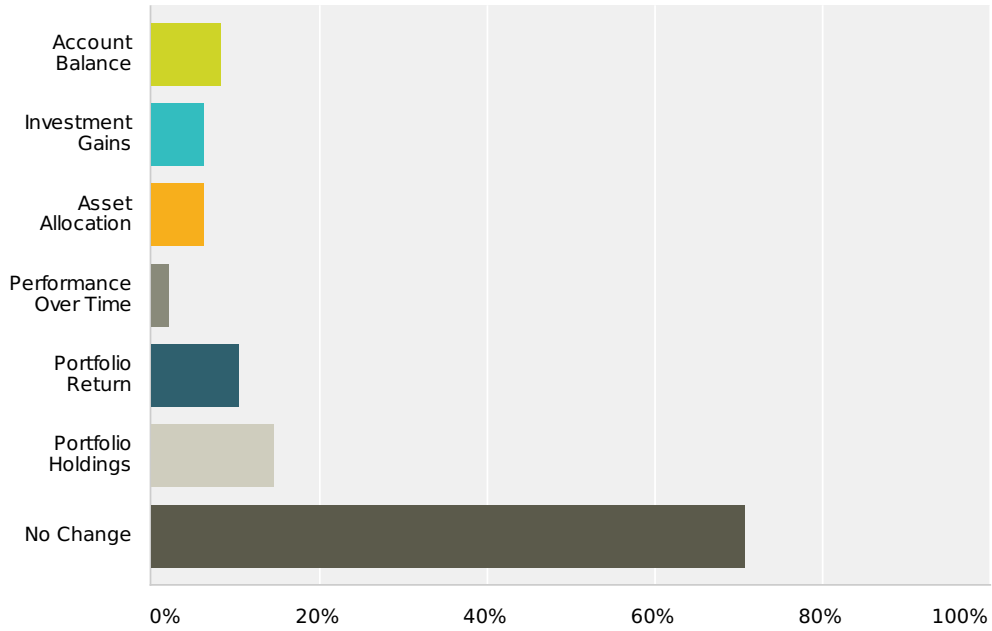
Answered: 55 Skipped: 3



Answer Choices	Responses	
Account Balance	80%	44
Investment Gains	72.73%	40
Asset Allocation	43.64%	24
Performance Over Time	76.36%	42
Portfolio Return	58.18%	32
Portfolio Holdings	18.18%	10
Total Respondents: 55		
Other (please specify) (4)		

Q2 What items are unimportant to you on the quarterly statement you receive from Rockbridge? (Select all that apply)

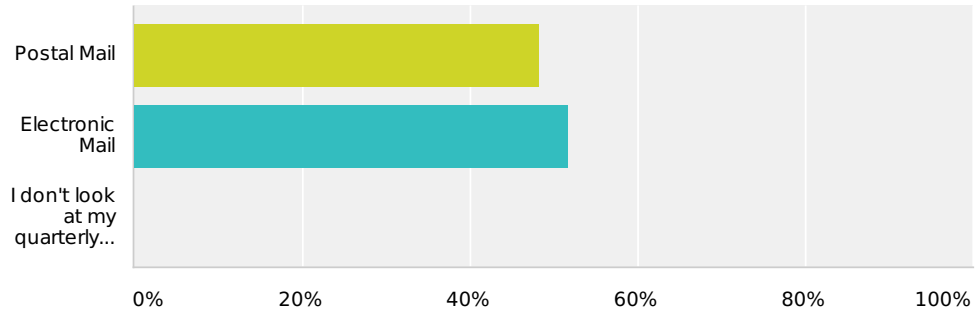
Answered: 48 Skipped: 10



Answer Choices	Responses
Account Balance	8.33% 4
Investment Gains	6.25% 3
Asset Allocation	6.25% 3
Performance Over Time	2.08% 1
Portfolio Return	10.42% 5
Portfolio Holdings	14.58% 7
No Change	70.83% 34
Total Respondents: 48	
Other (please specify) (5)	

Q3 How would you prefer to receive your quarterly statement?

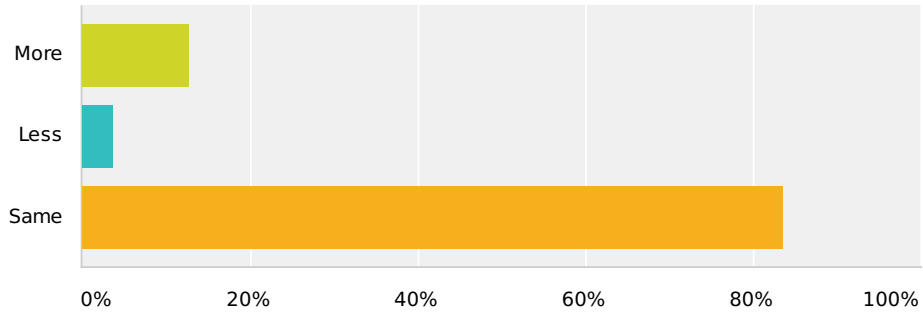
Answered: 56 Skipped: 2



Answer Choices	Responses	
Postal Mail	48.21%	27
Electronic Mail	51.79%	29
I don't look at my quarterly statements	0%	0
Total		56

Q4 Would you like to see more or less information on your quarterly statement you receive from Rockbridge?

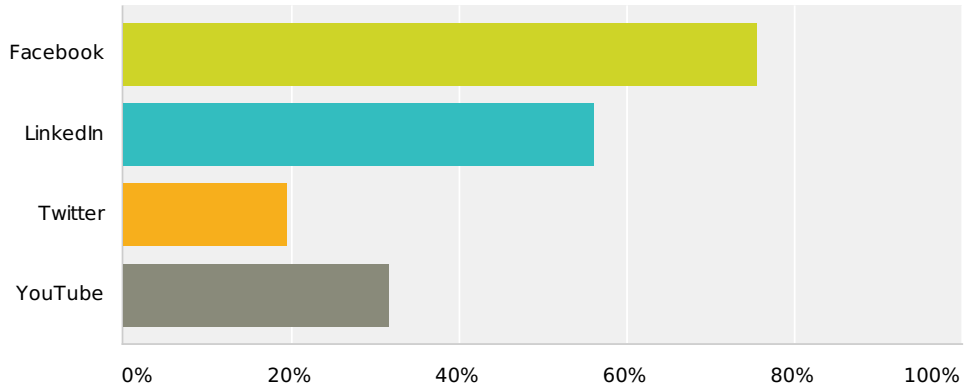
Answered: 55 Skipped: 3



Answer Choices	Responses
More	12.73% 7
Less	3.64% 2
Same	83.64% 46
Total	55

Q5 What social media platforms do you currently use? (Select all that apply)

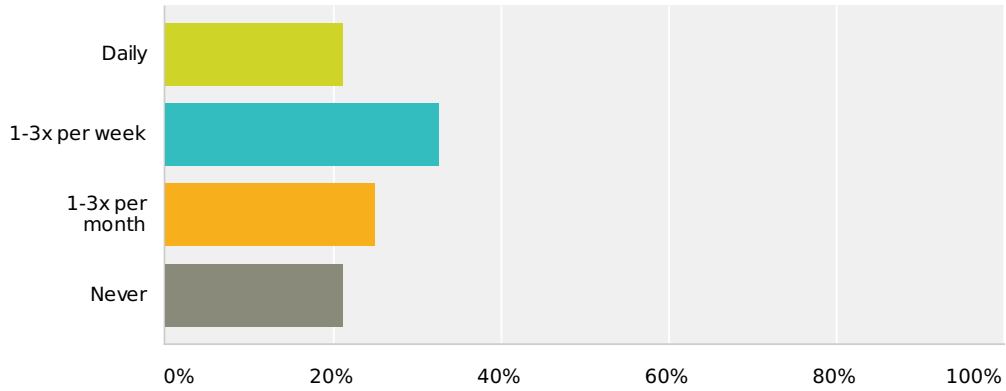
Answered: 41 Skipped: 17



Answer Choices	Responses
Facebook	75.61% 31
LinkedIn	56.10% 23
Twitter	19.51% 8
YouTube	31.71% 13
Total Respondents: 41	
Other (please specify) (9)	

Q6 How often do you use social media?

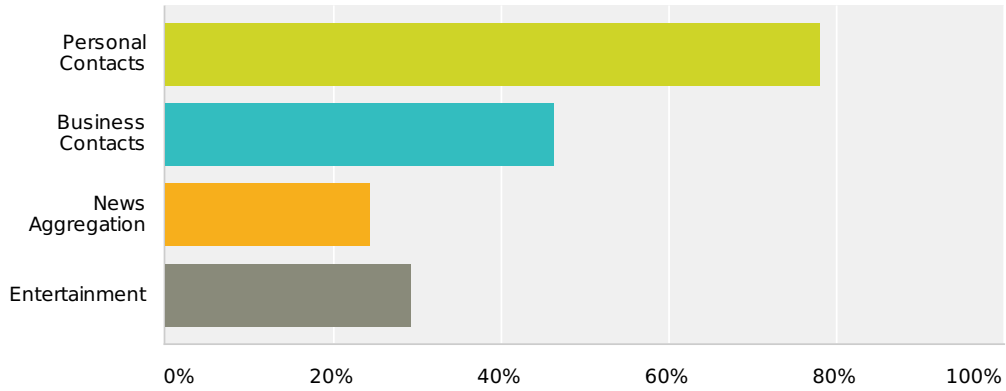
Answered: 52 Skipped: 6



Answer Choices	Responses
Daily	21.15% 11
1-3x per week	32.69% 17
1-3x per month	25% 13
Never	21.15% 11
Total	52

Q7 What do you use social media for? (Select all that apply)

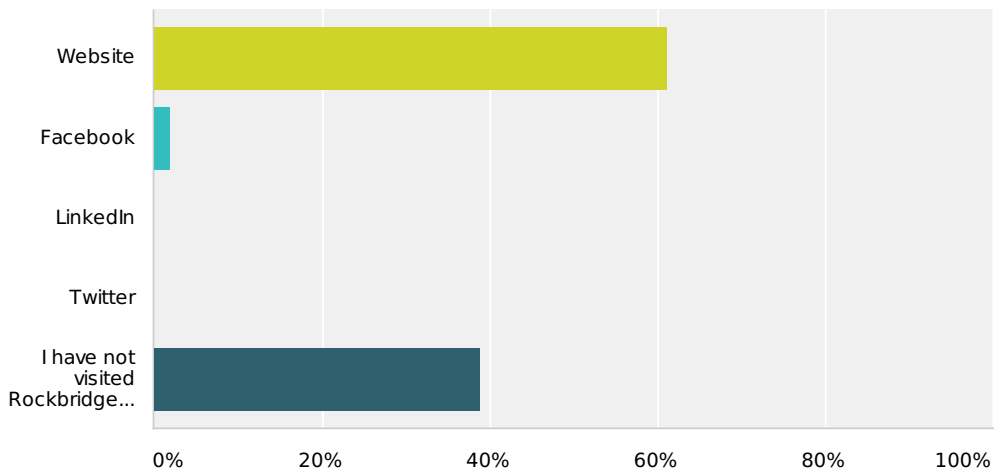
Answered: 41 Skipped: 17



Answer Choices	Responses
Personal Contacts	78.05% 32
Business Contacts	46.34% 19
News Aggregation	24.39% 10
Entertainment	29.27% 12
Total Respondents: 41	
Other (please specify) (3)	

Q8 Where have you visited Rockbridge online? (Select all that apply)

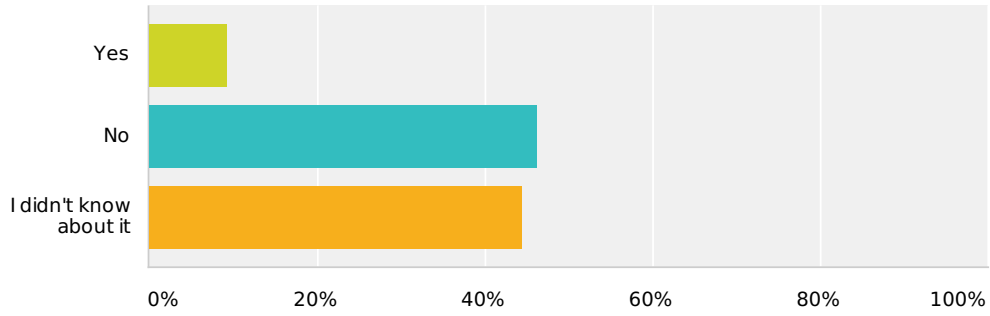
Answered: 54 Skipped: 4



Answer Choices	Responses
Website	61.11% 33
Facebook	1.85% 1
LinkedIn	0% 0
Twitter	0% 0
I have not visited Rockbridge online	38.89% 21
Total Respondents: 54	
Other (please specify) (0)	

Q9 Have you viewed the new Rockbridge Blog? (www.rockbridgeinvest.com/blog)

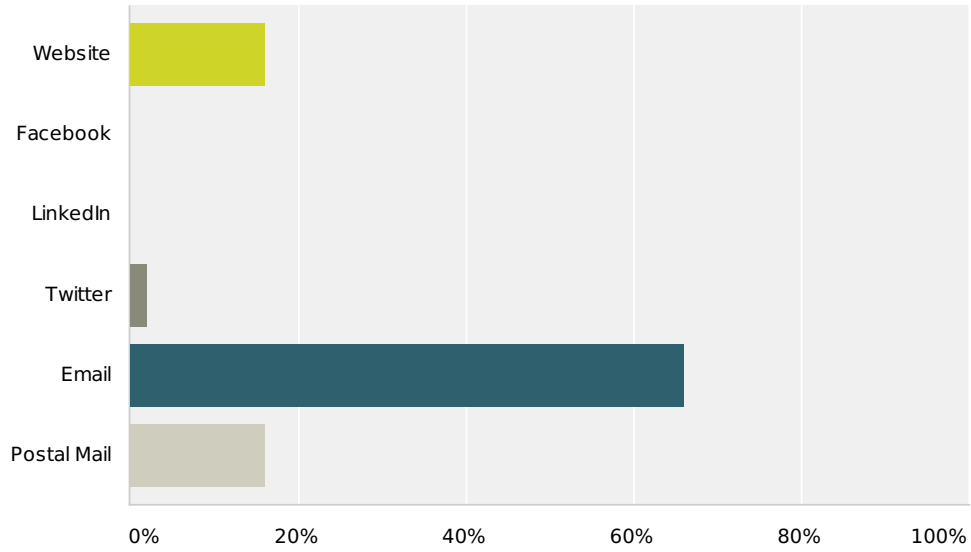
Answered: 54 Skipped: 4



Answer Choices	Responses	
Yes	9.26%	5
No	46.30%	25
I didn't know about it	44.44%	24
Total		54

Q10 What is the easiest method to follow Rockbridge updates?

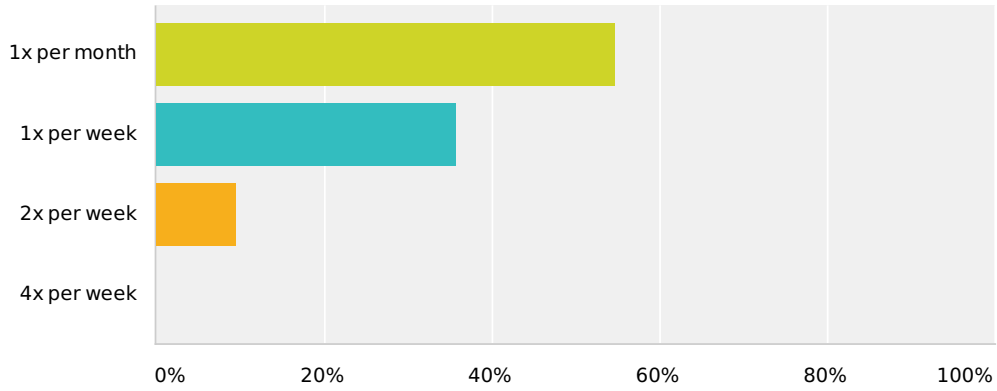
Answered: 50 Skipped: 8



Answer Choices	Responses
Website	16% 8
Facebook	0% 0
LinkedIn	0% 0
Twitter	2% 1
Email	66% 33
Postal Mail	16% 8
Total	50
Other (please specify) (1)	

Q11 How often would you want to see new blog posts from Rockbridge?

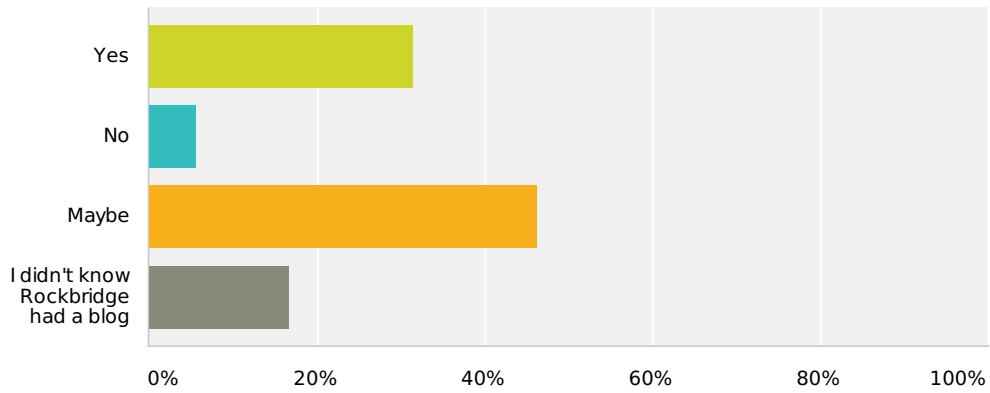
Answered: 42 Skipped: 16



Answer Choices	Responses
1x per month	54.76% 23
1x per week	35.71% 15
2x per week	9.52% 4
4x per week	0% 0
Total	42

Q12 Would a monthly summary of our blog via email be valuable?

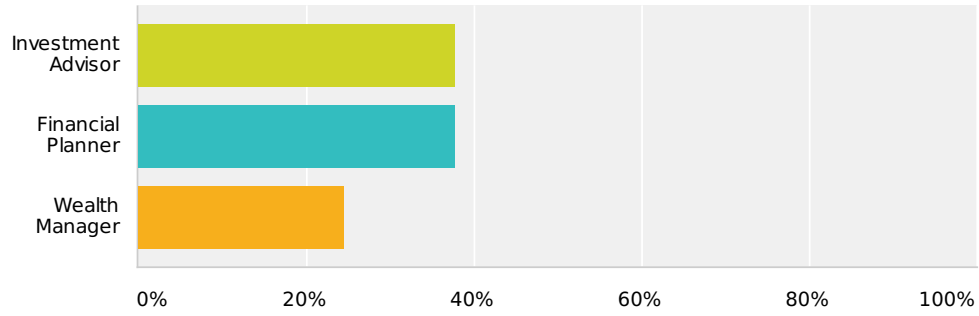
Answered: 54 Skipped: 4



Answer Choices	Responses
Yes	31.48% 17
No	5.56% 3
Maybe	46.30% 25
I didn't know Rockbridge had a blog	16.67% 9
Total	54

Q13 How would you describe Rockbridge to a friend or family member?

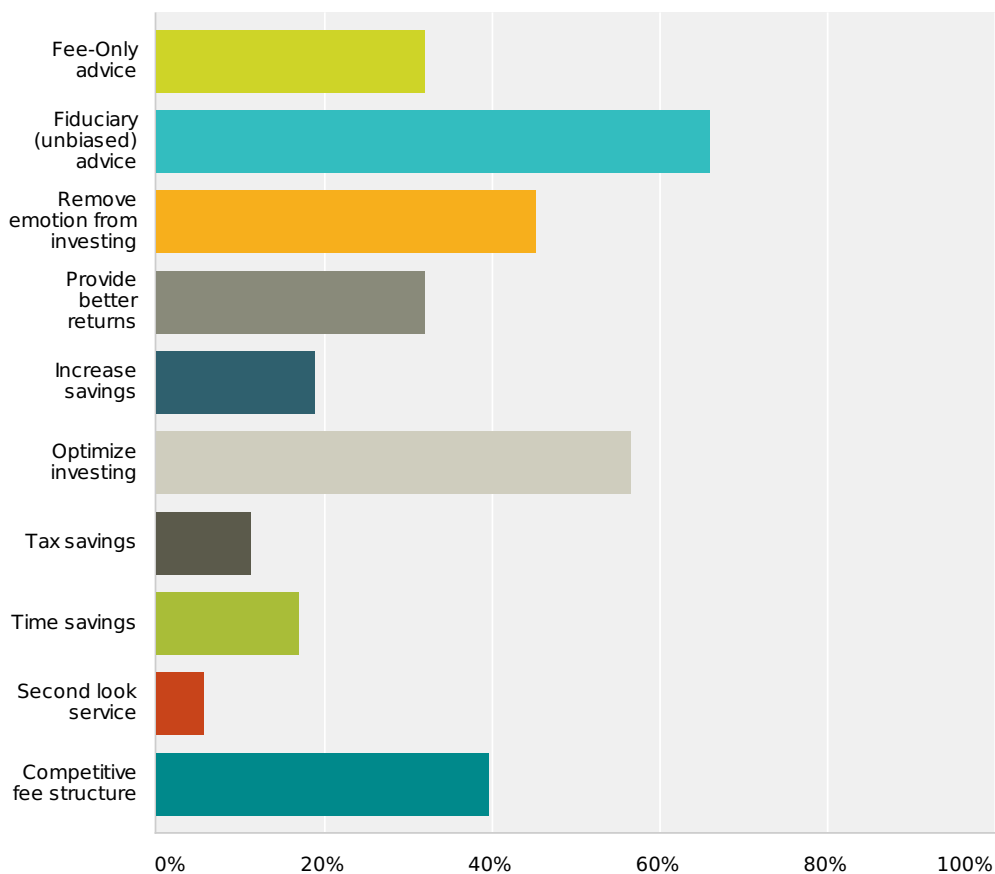
Answered: 53 Skipped: 5



Answer Choices	Responses
Investment Advisor	37.74% 20
Financial Planner	37.74% 20
Wealth Manager	24.53% 13
Total	53
Other (please specify) (3)	

Q14 What are the most valuable services Rockbridge provides? (Select all that apply)

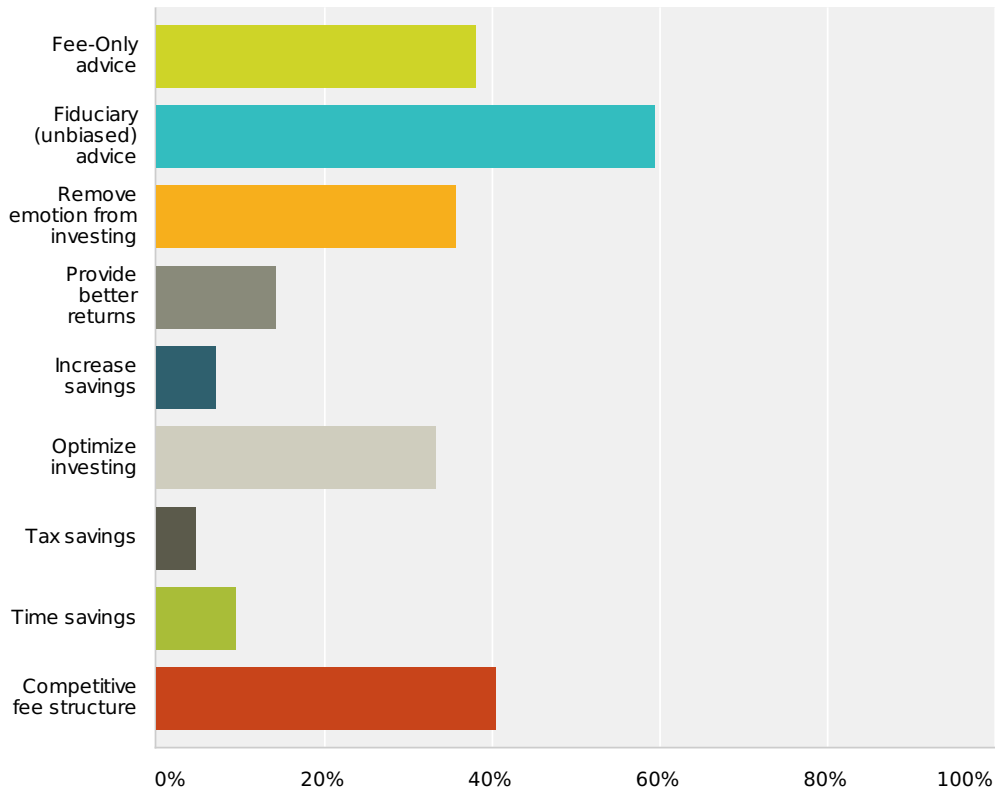
Answered: 53 Skipped: 5



Answer Choices	Responses
Fee-Only advice	32.08% 17
Fiduciary (unbiased) advice	66.04% 35
Remove emotion from investing	45.28% 24
Provide better returns	32.08% 17
Increase savings	18.87% 10
Optimize investing	56.60% 30
Tax savings	11.32% 6
Time savings	16.98% 9
Second look service	5.66% 3
Competitive fee structure	39.62% 21
Total Respondents: 53	
Other (please specify) (1)	

Q15 What separates Rockbridge from other investment professionals? (Select all that apply)

Answered: 42 Skipped: 16



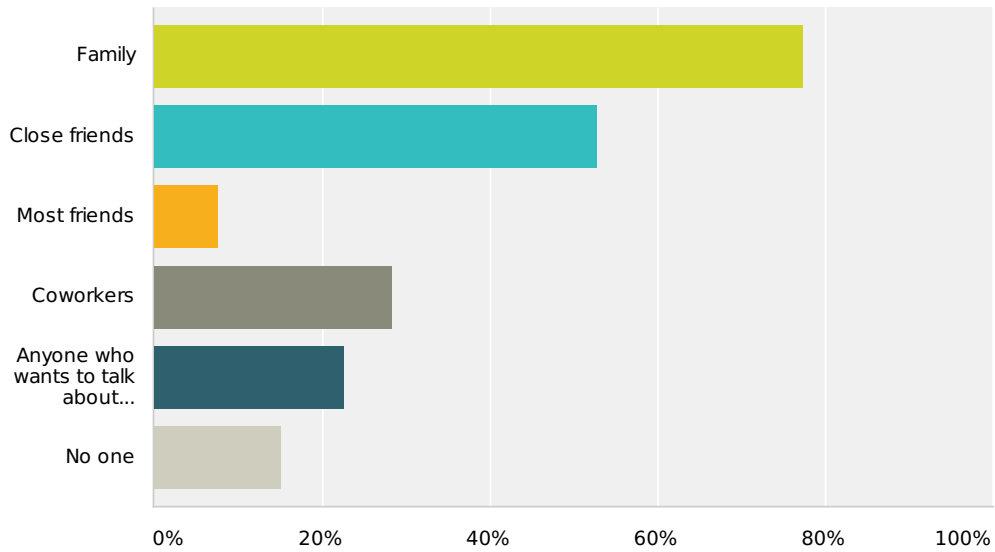
Answer Choices	Responses
Fee-Only advice	38.10% 16
Fiduciary (unbiased) advice	59.52% 25
Remove emotion from investing	35.71% 15
Provide better returns	14.29% 6
Increase savings	7.14% 3
Optimize investing	33.33% 14
Tax savings	4.76% 2
Time savings	9.52% 4
Competitive fee structure	40.48% 17

Total Respondents: 42

Other (please specify) (12)

Q16 Do you talk about finances and retirement with friends and family? (Select all that apply)

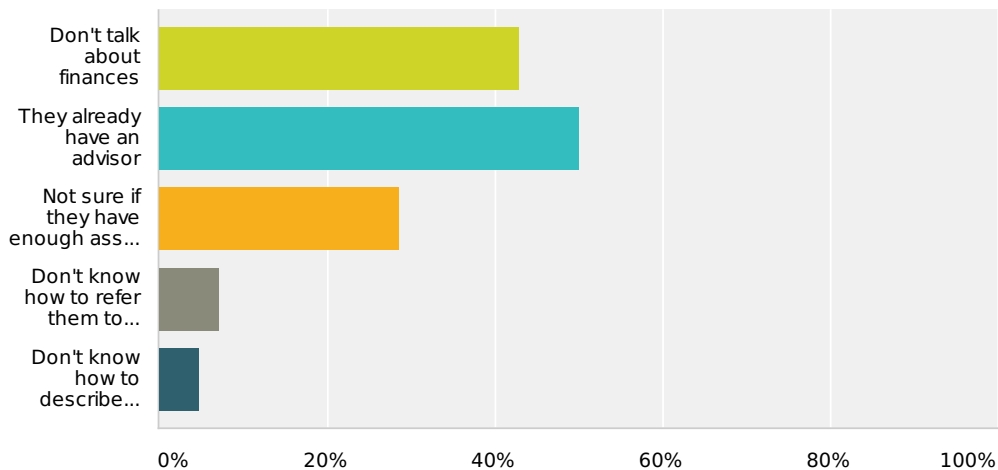
Answered: 53 Skipped: 5



Answer Choices	Responses	
Family	77.36%	41
Close friends	52.83%	28
Most friends	7.55%	4
Coworkers	28.30%	15
Anyone who wants to talk about investing	22.64%	12
No one	15.09%	8
Total Respondents: 53		
Other (please specify) (2)		

Q17 What is/are your biggest constraint(s) in discussing Rockbridge with friends and family? (Select all that apply)

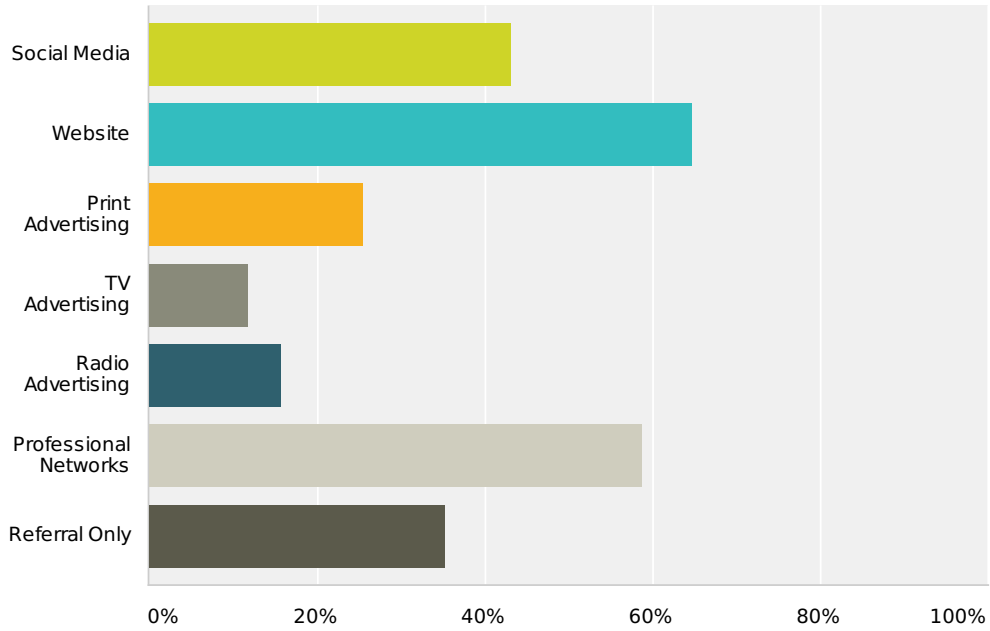
Answered: 42 Skipped: 16



Answer Choices	Responses
Don't talk about finances	42.86% 18
They already have an advisor	50% 21
Not sure if they have enough assets to work with Rockbridge	28.57% 12
Don't know how to refer them to Rockbridge	7.14% 3
Don't know how to describe Rockbridge	4.76% 2
Total Respondents: 42	
Other (please specify) (9)	

Q18 How should Rockbridge get its name out? (Select all that apply)

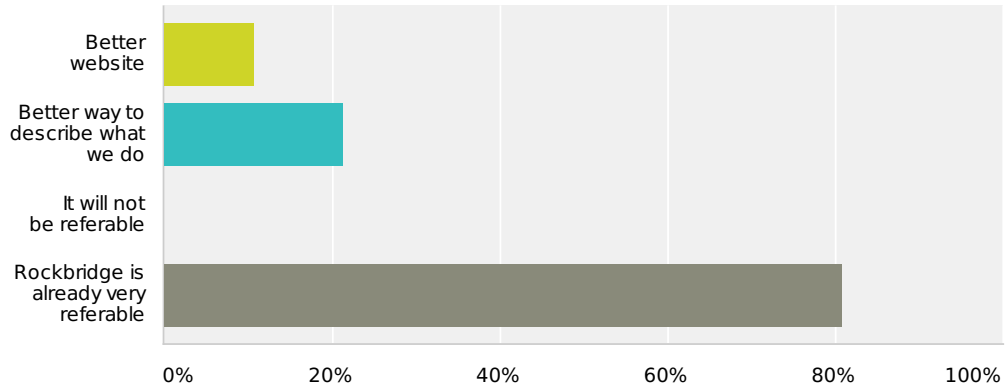
Answered: 51 Skipped: 7



Answer Choices	Responses	
Social Media	43.14%	22
Website	64.71%	33
Print Advertising	25.49%	13
TV Advertising	11.76%	6
Radio Advertising	15.69%	8
Professional Networks	58.82%	30
Referral Only	35.29%	18
Total Respondents: 51		
Other (please specify) (8)		

Q19 What would make Rockbridge more referable? (Select all that apply)

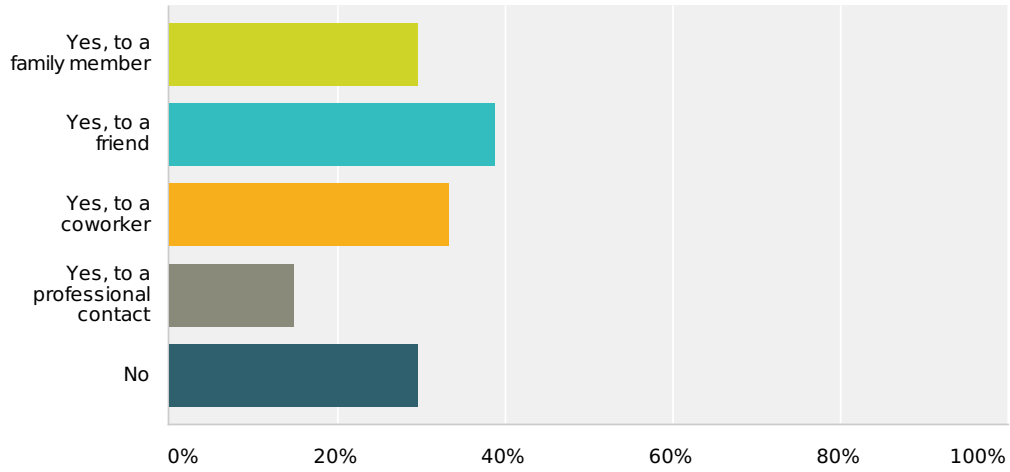
Answered: 47 Skipped: 11



Answer Choices	Responses
Better website	10.64% 5
Better way to describe what we do	21.28% 10
It will not be referable	0% 0
Rockbridge is already very referable	80.85% 38
Total Respondents: 47	
Other (please specify) (6)	

Q20 Have you ever recommended Rockbridge? (Select all that apply)

Answered: 54 Skipped: 4



Answer Choices	Responses
Yes, to a family member	29.63% 16
Yes, to a friend	38.89% 21
Yes, to a coworker	33.33% 18
Yes, to a professional contact	14.81% 8
No	29.63% 16
Total Respondents: 54	

Q21 Do you have any comments on how Rockbridge could improve its services?

Answered: 13 Skipped: 45