

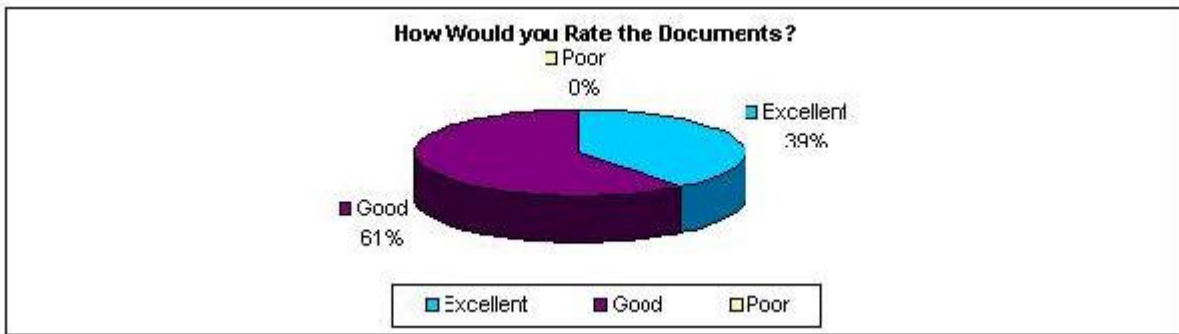
User Satisfaction Survey

As a result of RSP season PlanPlus closed off its User Satisfaction Survey results for this Fall. The survey was completed by *49.8% of Web Advisor users* from 8 of our corporate firms and independent ASP users. The graphs below give you a summary of the results:

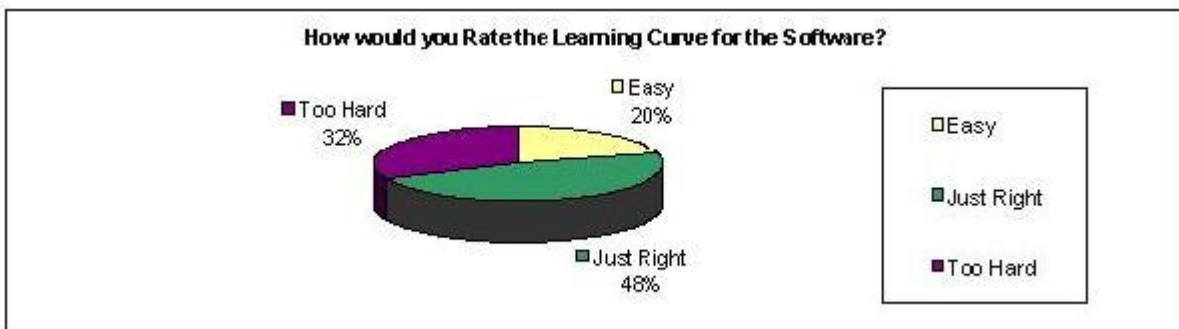
The features or functions that were most used:

- 32% said Life Planning or Retirement Planning
- 18% said calculators
- 16% said the IPS Document

About the documents:

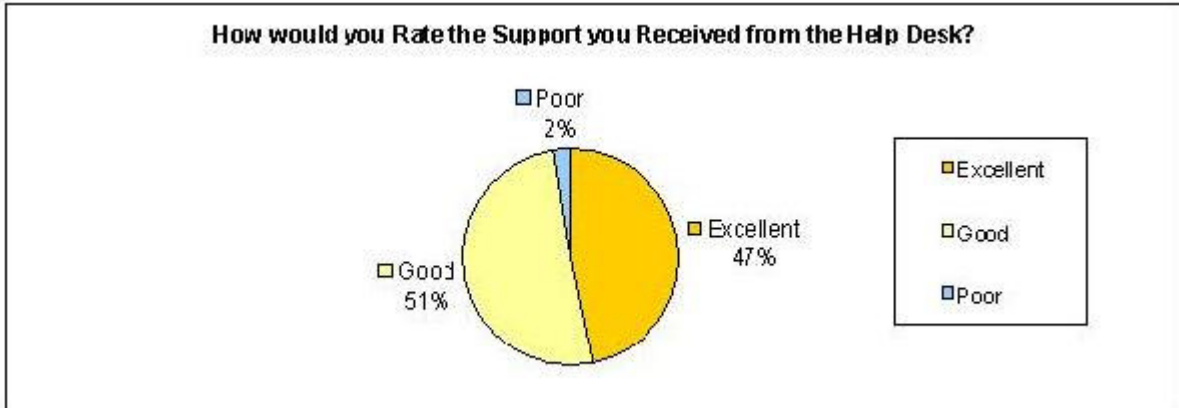


About the learning curve:



- Only 65% of our users were aware of the toll-free "800" phone number.
- Only 47.8% of users reported having experienced some problems. Of the users who had a problem, 86.6% called the Support Desk.

For those that did call the Help Desk:



Most Requested New Features

No single feature or request had more than 4.2% of respondents ask for it, and the top feature was the Detailed Cash Flow, which was just released in version 4.11. Other top requested items were:

- Simpler, more comprehensive documents (3.6%)
- More control on the order of use of funds in the Life Goals (3.6%)
- More on estate planning (3.6%)
- Easier data input for clients that are already retired (3.6%)
- More calculators that are simpler and more flexible (2.4%)

Use of the Training Centre

- 70% of surveyed users said that they were familiar with the Training Centre
- The User's Guide was the most often quoted resource but was rated as lacking in depth
- Elearning Modules rated second for usage but had excellent ratings for content

Overall, 87.7% of our users would recommend our software

Action by PlanPlus

From the results of the survey PlanPlus recognizes the over-riding challenge remains getting advisors over the initial learning curve. As a result we have initiated a number of new efforts:

- The Lunchtime Learning Series
- A project to create smaller, more "consumable" subsets of the eLearning
- A redesign of the User Guide to integrate references and links directly into the FAQs and eLearning components so that users can more easily find the assistance they need specific to a given topic