

WORTH A REED

A snow-covered hyacinth is a harbinger of spring!



From the Top

Jim Reed, CEO

Keeping an organization on track can be a challenge at times. First and foremost, we want to be sure we are meeting our client needs. While we think we are meeting those needs, we try to get your feedback in different ways. During update meetings, we ask how we are doing and if there are additional services we could be providing. Over the last three years, we have used various advisory boards with members from targeted areas, such as preretirement or recently retired for feedback. Those have been very helpful as well. Most recently, we completed a survey of the entire client base for more feedback.

Overall, we are extremely pleased with the feedback with the average ratings falling between 4.37 and 4.88. (5=extremely satisfied to 1=dissatisfied) Clearly, we are doing some things correctly. The lowest average, 4.37, came from satisfaction with investment results but given the markets we have been through over the last few years, we are extremely happy with this response.

Also many of you are ready for a change in our quarterly statements. The survey showed that 70% want less detail, some are happy as is and a few want more detail. This does present an interesting challenge, but one that we feel can be solved with some new software we will be implementing. In November of last year, we converted to a new Client Relationship Management (CRM) software which should help streamline even further our communicating with clients. Then in January, we committed to a new reporting system which should be fully implemented in January 2015 and will allow us to customize reports for clients to meet their requests.

While it is quick and easy to acquire new software, there is definitely more time involved in learning how to effectively use it. However the entire organization is excited and is anxious to get back up to speed as soon as possible.

Keep in mind that while we are trying to improve, our first priority is always to meet your needs. We look forward to your responses on our results in the future. ■

First Quarter 2014 Newsletter

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Please feel free to forward our newsletter to family, friends, or colleagues. If you would like us to add them to the list, please reply to this e-mail with their e-mail address and we will ask for their permission to be added.



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Thank you to everyone who came out and joined us at the Great Lakes Science Center this year. It was the second year of the event and we are excited to tell you that we increased attendance by over 25%. Wow! We always enjoy seeing everyone and their families. We hear so much about these special people that is wonderful to meet them in person.

We also want to thank you for your feedback with the quick survey. It turns out that the majority of you would like to change the venue for this year, so we are planning on holding our 2014 family event at the Cleveland Botanical Gardens on Saturday, December 27, 2014. **Thanks so much again for making this a great event!**

Wouldn't it be nice if financial goals were a little more fun?

Check out these amazing pictures captured by one of our clients on a recent Antarctica trip!



We would love to see other pictures from our clients and hear about what you enjoy. Please let us know!

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A New Addition to the RFS Extended Family!



The family of John May recently had another new addition to the family. And no, it was not the part Irish Setter, part Chesapeake Bay Retriever dog named Wookie, we told you about in the last newsletter!

John's wife, Carrie, gave birth to their second boy, Jase Alexander May. Jase was born Saturday, February 1, 2014 at 9:29 AM weighing in at 6 lbs., 13 oz. and 20 inches long.

Little boys are so much fun, they just had to have another one!

Stay up to date with RFS

Each day we read a lot of different publications to try and keep a pulse on what is going on in the world. Some of this information comes through to you at update meetings, in our newsletter, or in market commentary. But sometimes there are great articles that we think our clients would enjoy. To help communicate some of this information we will be posting links to commentary that we think would be of interest to our client base. These posts will take place every other Wednesday on our Facebook and LinkedIn corporate page. So if you are interested in receiving this information please "like" or "follow" us on these websites.

Recently we have made posts with articles about tax changes in 2013 and also protecting your tax return from identity theft. Let us know if you have any questions.

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