



EQUILIBRIUM IS 2023 GOLD!

Equilibriums' Success!

We are thrilled to announce that Equilibrium has once again achieved the Gold accreditation in the Investor in Customers (IIC) survey. With an outstanding overall score of 8.96/10, Equilibrium is in the top 4% of companies surveyed this year.

The 'IIC' Method

When assessing the business, IIC gathers feedback from clients, the team and managers to form the basis of its results, with the aim of understanding the alignment of each party's thinking. This provides valuable insights into the perspectives of all stakeholders involved.

The IIC scoring matrix is split across four key criteria: understanding customer needs, meeting customer needs, delighting customers and engendering loyalty. Equilibrium are pleased to say they were accredited Gold across all four areas.

Some words from their clients...

When asked what they do well, Equilibrium clients said:

"Explain things in an easy-to-understand manner. They are always available if advice is needed. They give confidence to clients so they don't have to worry about their investments."

"Knowing its customer and encouraging us to use our funds to make our lives better and not just watch it grow."

"Company communications are helpful and informative raising client awareness in topics that are relevant to personal circumstances. The Pulse and Mike's investment seminars are excellent in explaining market conditions, performance and the future outlook."

A word from our Tony!

"Equilibrium's results are exceptional! They clearly show the extent to which the client is at the heart of everything the firm stands for."
- Tony Barritt