NEWS
For Immediate Release

Media Contact:
Jonny Swift
Impact Communications, Inc.
913-649-5009
JonnySwift@ImpactCommunications.org

Three Sixty Wealth Management Launches New Website, Shares Survey Results from NEXA Insights

Chicagoland financial planning firm provides educational resources via modern website optimized with speed and ease-of-use in mind

NAPERVILLE, IL (October 19, 2021) – Three Sixty Wealth Management, a comprehensive financial planning and wealth management firm located in Naperville, Illinois and serving the greater Chicagoland area, recently launched their new website at www.ThreeSixtyWM.com. In addition, the firm is now able to reveal the scores obtained through a third-party survey assessment of their clientele.

ONLINE PLATFORM UNVEILED

Designed with a modern and fresh look and feel and optimized with speed and ease-of-use in mind, current and prospective clients can quickly navigate the Three Sixty website and find the information for which they're looking. In addition to learning more about the team at Three Sixty, as well as their services, specialties, and process, visitors can access blog posts, articles, and other educational resources, as well as access the client center to login to accounts – all easier and quicker than ever before.

"We're very happy to announce the launch of our new website, which makes it easier than ever for visitors to learn more about our process of designing, building, and protecting wealth," said Jim Dischert, RFC, Founder and CEO of Three Sixty. "In addition, we are excited to offer educational content and resources in the 'Insights' section of our website in order to help clients and other interested parties learn about a variety of topics, including personal finance, investing, estate planning, legacy planning, and more."

Three Sixty Wealth Management focuses on helping clients simplify and enrich their lives while addressing key moments across each phase of life. Using their proprietary WEALTHPRINT process, Three Sixty helps design, build, and protect their clients' lifestyles with an integrated approach that encompasses goals and aligns all essential financial aspects.

Through this WEALTHPRINT framework, Three Sixty develops customized wealth plans unique to each client. It was developed to help guide conversations with clients across the entire wealth management process, blending the art of the client's life and the science of Three Sixty's proprietary process to deliver progress in a meaningful way. This integrated approach allows clients to live their lives to the fullest and focus on what truly matters to them while leaving all the details to Three Sixty.

SURVEY RESULTS FROM NEXA INSIGHTS

Three Sixty Wealth Management also recently completed a survey through NEXA Insights, a company that provides first-class client experience surveys and analytics for Registered Investment Advisory firms. These surveys enable RIAs to research client opinions, analyze responses with comprehensive data, analytics, and insights, identify at-risk clients, maximize client retention, build client loyalty, identify clients who are willing to refer, and better position themselves among prospective clients.

Three Sixty had a response rate of 58%, which according to Chris Manker, founder of NEXA Insights, is a fantastic response rate. The survey reveals how Three Sixty clients as a whole feel about their relationship with the firm:

- Out of 117 respondents, 109 of Three Sixty's clients were identified as advocates.
- For their overall score, with a benchmark of 9.38 out of 10, Three Sixty received a score of 9.61.
- For their 'Engagement' score, with a benchmark of 9.40 out of 10, they received a score of 9.60.
- For their 'Satisfaction' score, with a benchmark of 9.43 out of 10, they received a score of 9.64.
- For their Net Promoter Score, with a benchmark of 84 out of 100, they received a score of 95 – indicating that 95% of clients would be willing to recommend Three Sixty to a friend, family member, or colleague.

"I am so proud of our staff and how well we scored in servicing our clients," said Dischert. "We work hard every day to provide value for our clients, and this survey validated that our clients feel the same way."

Thanks to the survey, Three Sixty was able to identify new opportunities with which clients needed help, including estate planning, tax planning, life insurance planning, retirement income needs, aging parent needs, and family wealth counseling. In addition, they were able to identify clients who were willing to refer prospective clients to them and were also able to gauge their clients' current market sentiment. In addition, the survey showed that they had only one "at-risk" client.

To learn more about NEXA Insights, please visit www.NEXAInsights.com. To learn more about working with Three Sixty Wealth Management, please visit www.ThreeSixtyWM.com.

ABOUT THREE SIXTY WEALTH MANAGEMENT

Three Sixty Wealth Management is a comprehensive financial planning and wealth management firm located in Naperville, Illinois, serving the greater Chicagoland area. The firm specializes in developing customized financial plans unique to each client and provides holistic services ranging from investment advisory and retirement planning to tax and estate planning. As a SEC Registered Investment Advisor, Three Sixty is truly able to serve as a fiduciary and act in clients' interests 100% of the time. Their clients are affluent families, business owners, and key executives who are dealing with complex financial issues, working to simplify their lives, and seeking a different level of tailored advice. Learn more at www.ThreeSixtyWM.com.

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