

Customer Satisfaction Survey

We want to ensure that we provide you with the best possible service. To do this we need your valuable feedback on what we have done right and perhaps more importantly, if we have done anything wrong or something that you felt we could improve on. Please could you assist us by spending a few minutes to complete and return this survey using the pre-paid envelope enclosed.

If you would like to return the form anonymously please do not complete your name and postcode.

Name	Date of Birth
	Post Code

1. Overall Objective

Why did you contact us?

Did our advice meet your objective? Yes / No (please circle) If No, please explain why.
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2. Pre-Advice Service

Please explain your understanding of the service we offered and how we charge for it?

3. Advice

What did you understand about the advice we gave and how it affects you now and in the future?
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How were you kept appropriately informed before, during and after the point of sale?
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How did we provide you with clear information before, during and after the point of sale?

Please explain your understanding of the risks involved in the product you have taken out? For example, what type of investment is it and what can happen to it?

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How satisfied were you with the time it took to advise you? (Please circle the relevant answer)

Very satisfied	Satisfied	Unsatisfied
If unsatisfied, please explain why		

4. Post-Advice Service

Please explain what you understand to be the service we will provide in the future to you.

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5. Overall Service

Were all our communications with you (oral and written) clear or was there anything misleading?

Please comment on our communications

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Based on the information and documents provided during the course of the transaction, is there anything about it that you don't understand? (Please circle the relevant answer)

Yes / No

If yes please tell what part(s) you don't understand

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Do you think that we have treated you fairly or unfairly? (Please circle the relevant answer)

Fairly

Unfairly

Please explain why you think this

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If we could do one thing to improve the service provided to you when we advised and arranged the transaction(s) what would it be?

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Thank you for taking the time to complete this questionnaire.