

## Client Feedback Questionnaire

FOR: .....

Please rate each of the following questions against a scale where

5 = Excellent 4 = Good 3 = OK 2 = Poor 1 = Dreadful

Satisfaction Factor	Customer Rating (1 to 5) Or NE if No Experience	Customer Comments (use reverse of this questionnaire if more space is required)
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### MY ADVISER:

My Adviser took time to understand my circumstances and my attitude to risk		
My Adviser explained the proposals in language I understand		
My Adviser's written proposals were clearly expressed and easy to follow		
My Adviser did not put me under any pressure to proceed		
My Adviser explained how my advice would be paid for and confirmed this in their correspondence		

### SUPPORT, PROVISION OF INFORMATION & ONGOING COMMUNICATION:

I can usually get hold of someone to help me with queries when required		
I am kept up to date with valuations and reviews on a sufficiently frequent basis		

**Continued Overleaf**

SUPPORT, PROVISION OF INFORMATION & ONGOING COMMUNICATION (Continued):

Your staff are friendly, courteous and helpful		
Your staff do what they say they are going to do within an agreed timeframe		
Your letters, brochures and other communiqués are easy to understand		

OVERALL EXPERIENCE:

I feel that the service you provide offers me value for money		
I feel that my Adviser and your firm has treated me fairly		
I would be happy to recommend my adviser to friends and family		

<p>Name: .....</p> <p>Signed: .....</p> <p>Dated: .....</p>
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