



FINANCIAL SERVICES LTD

## QUALITY OF SERVICE QUESTIONNAIRE

**POST TO US or FAX BACK TO 01482 334617**

We like to think we do a good job. But we'd also like to know if that's not the case. As part of our continual efforts to provide clients with a better and more appropriately focused service, we would appreciate it if you would complete the short questionnaire below. Please tick the appropriate response.

	Statement	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	N/a
1	I was given details clearly explaining your services early in our discussions.					
2	I understand the choices I have to pay for your services.					
3	I discussed and agreed whether the advice I received covers my specific needs, or is limited to particular areas, which I chose.					
4	I was given the opportunity to provide enough information for the adviser to 'get to know' my business and my needs and objectives.					
5	For investment products purchased: I feel that the adviser did a thorough job in helping me understand investment risk and my attitude towards risking my own money.					
6	I understand how the advice I received meets my financial needs and objectives.					
7	The adviser helped me understand what is and isn't covered by the product I have purchased.					
8	If I have cancelled a policy, connected with this advice, I received an explanation of the pros and cons of this in plain language.					
9	I have received a letter providing me with a clear explanation of the advice I received.					
10	I am aware of any ongoing advice and service I can expect to receive.					
11	I would recommend you to others.					

Please provide any additional comments you wish to make.

I would be happy for these comments to be used on your promotional material.

Yes

No

**Thank you for taking the time to complete this survey**

Customer's name:		Signature:	
Adviser's name:		Date:	

Please accept our thanks for taking the time to complete this form. We assure you that we value your input and will look to continue improving the service we provide as a direct result of this feedback.