



MORTGAGE QUESTIONNAIRE

FINANCIAL SERVICES LTD

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 and their costs early in our discussions.					
2	I understand the choices I have to pay for your services.					
3	I believe that I was given the opportunity to provide enough information for the Adviser to understand my circumstances, needs and objectives.					
4	The Adviser told me about the costs or penalties as well as the advantages of the mortgage recommended.					
5	I feel that the Adviser helped me to understand how much I could afford to borrow and discussed my income and expenditure levels.					
6	I understand how the features of the mortgage I have purchased meet my financial needs and objectives.					
7	The Adviser made me aware of the risks involved with my mortgage for my chosen repayment plan/term and suggested viable alternative options even if I did not take this advice.					
8	If I have re-mortgaged from another lender, the Adviser helped me to make an informed decision about whether the benefits of the switch out-weighed the costs.					
9	I have received a letter providing me with a clear explanation of the advice I received.					
10	I have been made aware of other financial planning areas that might need reviewing at some time in the future.					
11	I will use this Adviser again for mortgage advice.					
12	I would recommend my friends, family and colleagues to the Adviser.					

Please provide any additional comments you wish to make:

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.