



QUALITY OF SERVICE QUESTIONNAIRE

FINANCIAL SERVICES LTD

We like to think we do a good job and 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.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 I understand the choices I have to pay for your services.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 I discussed and agreed whether the advice I received covers all possible needs, or is limited to particular areas, which I chose.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4 I believe that I was given the opportunity to provide enough information for the Adviser to understand my circumstances, needs and objectives.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6 I understand how the advice I received meets my financial needs and objectives.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7 The Adviser helped me understand what is and isn't covered by the product I have purchased.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9 I have received a report providing me with a clear explanation of the advice I received.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10 I am aware of any ongoing advice service I can expect to receive and how this will be paid for.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11 I have been made aware of other financial planning areas that might need reviewing at some time in the future.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12 I would recommend my friends, family and colleagues to the Adviser.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Please provide any additional comments you wish to make:					
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.