

## Customer Survey

Statement	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	N/a
1 I was given details clearly explaining your services and their cost 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 ALL possible needs, or is limited to particular areas, which I chose.					
4 I believe that I was given the opportunity to provide enough information for you to 'get to know' me, my needs and objectives.					
5 You told me about the limitations as well as the advantages of the product(s) recommended.					
6 I feel that you did a thorough job in helping me understand investment risk and my attitude towards risking my own money.					
7 I understand how the advice I received meets my financial needs and objectives.					
8 You helped me understand how much protection cover I needed and could afford.					
9 You helped me understand what is and isn't covered by the product I have purchased.					
10 If I have cancelled a policy, connected with this advice, I received an explanation of the pros and cons of this in plain language.					
11 I have received a letter providing me with a clear explanation of the advice I received.					
12 I have been made aware of other financial planning areas that might need reviewing at some time in the future.					
13 I am aware of any ongoing advice service I can expect to receive and how this will be paid for.					
14 You could improve your service by...					
15 Please provide any additional comments you wish to make.					
16 I would be happy for these comments to be used on your promotional material.				Yes	No
17 I would be prepared to introduce my friends, family and colleagues to you.				Yes	No
18 I will use the adviser again for financial advice.				Yes	No

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

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