



TCF Questionnaire

	HIGH					LOW				
1. Did you find us to be courteous and professional in all our dealings with you?	5	4	3	2	1					
2. Was contact made by your adviser promptly and did your meetings meet your expectations?	5	4	3	2	1					
3. Do you feel that the financial advice given has addressed all your areas of concern or are there any areas that remain outstanding?	5	4	3	2	1					
4. Did you find the report, information and documentation provided to be accurate and was it presented in a clear concise and relevant format?	YES	<input type="checkbox"/>				NO	<input type="checkbox"/>			
5. Do you feel that the relationship between risk and reward were clearly explained? Was this also explained in relation to your own attitude to risk?	YES	<input type="checkbox"/>				NO	<input type="checkbox"/>			
6. Do you feel that you understand the products/service you have bought and the reasons why?	YES	<input type="checkbox"/>				NO	<input type="checkbox"/>			
7. Are there any areas that you feel require further clarification?	YES	<input type="checkbox"/>				NO	<input type="checkbox"/>			
8. Would you recommend our services to friends, family and colleagues? Please specify the main reasons why.	YES	<input type="checkbox"/>				NO	<input type="checkbox"/>			

If Yes, please indicate the reasons below. For example:

- The level of courtesy shown to you
- The level of knowledge displayed.
- You were kept fully informed throughout the process
- We were easy to contact
- You found us efficient
- Any problems were resolved quickly and to your satisfaction

If no, please state your reasons why.

Additional Comments:

Please tick here if you do not wish any of the information provided on this form to be used on our website



Signature:

Date:

Print Full Name:

Postcode:

Thank you for taking the time to complete this questionnaire.

If you would like to recommend our services to any family, friends or colleagues please provide their details in the section below and return with your questionnaire, OR pass the enclosed forms to the appropriate person to complete OR contact us on **0345 644 4282**.

PLEASE CONTACT THE FOLLOWING:

Name:

Address:

Postcode:

Contact Number:

Details of advice required: