

Principle First - Customer Satisfaction Questionnaire

Name: _____ Address: _____

Adviser: _____ Client Account Manager: _____

Treating Customers Fairly - Service Delivery

(Please tick the most appropriate box)

	Very Good	As Expected	Below Expected	Poor
1. Was the service provided by Principle First well defined and were you clear about what products were being provided to you?				
2. Have you found staff helpful with your business dealings?				
3. When contacting the office did you feel satisfied with the response?				
4. How did you find the quality and frequency of updates provided to you?				
5. How well did you understand the way in which Principle First was to be remunerated?				
6. How well do you feel you have been treated fairly when raising any enquiries with Principle First?				
7. Overall how would you rate the service provided by Principle First?				

Treating Customers Fairly - The Adviser

(Please tick the most appropriate box)

	Very Good	As Expected	Below Expected	Poor
1. How well do you feel that the adviser understood your financial requirements?				
2. How well did the adviser explain how the product(s) worked?				
3. How well do you feel that the adviser's recommendations take account of your attitude towards risk?				
4. How well did the adviser put you at ease to ensure you were confident with your product choices?				

Treating Customers Fairly - Communications

(Please tick the most appropriate box)

	Very Good	As Expected	Below Expected	Poor
1. Was any correspondence, such as letters and brochures, easy to understand?				
2. If applicable, how do you feel about the regularity of your investment value updates?				
3. How well do you feel that your queries have been considered?				

General

Which method(s) of update did you prefer? (Please tick all that apply) Phone Post Email Text Message

Would you recommend Principle First to others? Yes No

Would you have referred clients to us if we had not asked? Yes No

Additional Comments / Testimonial - We would appreciate any comments you have to make about our service.

(Your testimonial may be used on our website. Your details will be displayed as Mrs A Smith, Strabane however if you would prefer us not to use it in this way please tick here)

Client Referral - Please complete the details of your friends and family below who you think could benefit from our free financial review.*

Name	Address	Tel No

* Please only enter details here of friends and family who are aware we will be contacting them