

Treating customers fairly survey

Our promise to you is that we will always treat you fairly. You can expect in all our dealings with you that we will:

- treat you as we would expect to be treated
- never take advantage of you
- be open and honest
- quickly put right any mistake that we make

Are we keeping our promise? Please take a few moments to let us know how we're doing. Please rate each of the following against a scale where:

5= Strongly Agree 4= Agree 3= Partially Agree 2= Disagree 1= Strongly Disagree

		Rating	Additional comments
1	My adviser took the time to understand my circumstances and my financial needs		
2	The advice my adviser gave me was clear and easy to understand		
3	The product or service my adviser recommended met my needs		
4	The written information I received from my adviser was clear and easy to follow		
5	My adviser explained the cost of the advice to me		
6	My adviser was easy to contact and available to help me with queries when required		
7	My adviser treated me in a friendly, courteous and helpful manner		
8	My adviser contacts me on a regular basis to review my needs		
9	I would recommend my adviser to a friend		
10	My adviser kept the Intrinsic Customer Promise in all dealings with me		

Thank you for completing this survey.

Name _____ Adviser's name _____

Signed _____ Date _____