

Treating Customers Fairly - Client Questionnaire

At H D Consultants we are very interested to hear back from our Clients to see if they are happy with the advice they have been given and that they feel they have been treated fairly by ourselves.

We would appreciate it if you could take the time to complete this Client Questionnaire, and we will use the information to constantly strive to improve our service levels.

Your name(s)	MICHAEL E LACKER
Adviser name	HOWARD REUBEN
Product type	MORTGAGES

Please rate by circling how you found our service using the following guide;

1- Strongly disagree 2- Disagree 3- Neither agree nor disagree 4- Agree 5- Strongly agree

Adviser

- Was the adviser clear and polite?

1 2 3 4 5

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- Would you use this adviser for financial advice in the future?

1 2 3 4 5

- Would you recommend this adviser to a friend?

1 2 3 4 5

- Has the adviser contacted you since the policy was taken out?

1 2 3 4 5

- Do you feel that the fees that the adviser has charged are fair? (if applicable)

1 2 3 4 5

- Was the adviser's technical knowledge satisfactory?

1 2 3 4 5

Advice

- Did the adviser explain their 'Whole of Market' status, issue the Initial Disclosure Document and explain the Financial Services Authorities regulations and complaints procedure?

1 2 3 4 5

- Did they explain the products and terms in a way that was easily understood?

1 2 3 4 5

Are you happy with the product(s) that have been recommended?

1 2 3 4 **5**

Were you provided with clear information and kept appropriately informed before, during and after the point of sale?

1 2 3 4 **5**

Do you feel that the advice that you have been given is suitable and takes account of your circumstances?

1 2 3 4 **5**

Has the product, that has been recommended, performed as the firm has led you to expect, and has the associated service been both of an acceptable standard and as you have been led to expect?

1 2 3 4 **5**

Did you feel the adviser considered all aspects of your financial needs and objectives (e.g. short/long term goals and aspirations, protection needs including dependent protection/critical illness cover/protecting your income)?

1 2 3 4 **5**

Did you feel the adviser gained enough information from you about your personal and financial circumstances (e.g. present financial circumstances and personal details, long/short term financial goals and aspirations) before making their recommendations?

1 2 3 4 **5**

Do you feel confident that the firm that you have dealt with has the fair treatment of its customers as central to its corporate culture?

1 2 3 4 **5**

Do you have any comments on our service or in general on how we could improve our service:

HOWARD & DIANE WERE AWESOME,
AMAZING MORTGAGE DEAL AND SORTED
OUT ALL OUR HEALTH & LIFE INSURANCES.
GREAT JOB!!!

Thank you for completing this questionnaire.

Please return to HD Consultants in the pre paid envelope provided.