

Beanland Financial Services Limited

Treating customers fairly survey

Beanland Financial Services Ltd 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	Comments and additional information
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 in line with my expectations based on our agreement to review my needs		
9.	I would recommend my adviser to a friend. Please leave details in additional information		Name..... Tel
10.	My adviser kept the Customer Promise in all dealings with me (As outlined at the top of this page)		

Name _____ Adviser's name _____

Signed _____ Date _____

Thank you for taking the time to complete this survey
Please return to:-

Beanland Financial Services Limited, Unit 4, Croft Court, Croft Lane, Temple Grafton, Alcester, Warwickshire B49 6WP