

Hedley Asset Management Ltd

CLIENT SURVEY

Client Name : **Email***

Product or service provided:

**Please tell us about the service which you most recently received from us, where
1 = strongly disagree and 5 = strongly agree**

bad>>>>>good
1 2 3 4 5

- Section One:**
Service
And
Administration
1. The service is well defined – I know what I am getting
 2. Service is always provided in a timely manner
 3. All staff in the business are very helpful
 4. I can always get hold of the right person
 5. The business holds accurate, up to date information about me and my investments
 6. I understand how I am being charged for service and advice
 7. I do not think that I am overcharged
 8. The business 'treats its customers fairly'

- Section Two: The Adviser**
The Adviser
9. seemed genuinely interested in my situation
 10. did not put me under pressure
 11. took time to understand my needs
 12. focused on those needs rather than on what he/she might earn from advising me
 13. gave me objective advice, with a lot of information about how he/she had arrived at it
 14. had a good understanding of what products were available
 15. explained how the products worked including any pitfalls
 16. worked well with other professionals (e.g. my accountant)
 17. I was happy with the advice given
 18. The recommendations accounted for my needs, circumstances and attitude to risk
 19. My affairs are reviewed in a timely manner

- Section Three:**
General
Communications
20. Letters and brochures are easy to understand
 21. I am kept up to date with the value of my investments
 22. The number of communications I receive is about right
 23. Communications are relevant to me
 24. My queries are properly considered
 25. I always receive a reply to my queries
 26. The written explanations I receive confirm what I am told verbally
 27. Any errors are handled appropriately and sorted out quickly
 28. Your website www.hedleyasset.co.uk is useful, clear and not misleading

In the space below please write any additional comments that you would like to make. In particular, have you any suggestions on how we could improve our services?

Service/Administration	
The Adviser	
New Website comments please!	
Referrals	Our reputation has been built on the quality of our service and on recommendations from existing clients. If you have been pleased with our services would you be happy to introduce us to like-minded colleagues or friends? Yes / No*

I authorise Hedley Asset Management Ltd to communicate with me in future by e-mail / telephone / letter / any of these* (delete as required)

Signed.....

Date:.....

Please return this form to Hedley Asset Management Ltd, Williamson House, Swan Square, Haverfordwest SA61 2AN, or fax to 01437 767766, or email ask@hedleyasset.co.uk