



15 OCT 2018

# Thomas & Co Financial Services

INDEPENDENT FINANCIAL ADVISERS

## CUSTOMER SURVEY

Please rate the following points from 0 to 10 where 10 is best

How clearly did we present the services we offer?	10
Do we answer calls promptly and efficiently?	10
Do we get back to you when promised?	10
Do we make things easy to understand?	10
Do we process your business quickly and efficiently?	10
Do we keep you informed?	10
Do we spend enough time with you finding out about your needs?	10
Do we spend enough time explaining how things work and the risks involved?	10
Do we present ourselves in an open and honest way?	10
Are our fees in accordance with your expectations?	10
What overall score do you think we deserve?	10

If there is any issue you feel you do not understand or require further clarification on, or wish to make any other comment, please let us know below. Although there is no obligation to put your name on the questionnaire, please bear in mind that we are unable to provide an individual response if you do not.

### Comments

Name (optional)

jrb

98 Ock Street • Abingdon • Oxon • OX14 5DH

Tel: (01235) 522003 • Fax: (01235) 527291 • email: enquiries@tacfs.co.uk • www.tacfs.co.uk

Partners: G.L. Harper, DipFA MIFS J.R. Berry, DipFA MIFS



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## CUSTOMER SURVEY

Please rate the following points from 0 to 10 where 10 is best

How clearly did we present the services we offer?	9
Do we answer calls promptly and efficiently?	10
Do we get back to you when promised?	10
Do we make things easy to understand?	10
Do we process your business quickly and efficiently?	10
Do we keep you informed?	8
Do we spend enough time with you finding out about your needs?	10
Do we spend enough time explaining how things work and the risks involved?	10
Do we present ourselves in an open and honest way?	10
Are our fees in accordance with your expectations?	10
What overall score do you think we deserve?	10

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### Comments

Name (optional) \_\_\_\_\_

gs



## Thomas & Co Financial Services

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09 October 2018

Dear Alan

Thank you for taking the time and trouble to complete our Customer Survey, which we received today. The surveys are particularly important to us as they provide a very reliable measure of our service standards and we take the results extremely seriously.

To this end, I notice that you have given us a low score (5 out of a possible 10) for time spent explaining how things work and the risks involved. I am concerned that we have not lived up to your expectations and I think it is important for us to arrange another meeting when we can focus on the issues raised, until you are completely comfortable with your level of understanding.

I would be grateful if you could call me at your earliest convenience to arrange an appointment and please accept my sincere apologies for the shortcomings you have identified.

Best wishes

Yours sincerely

Dan Smith IMC MLIBF AwPETR AdvDipFA  
Consultant  
email: [ds@tacfs.co.uk](mailto:ds@tacfs.co.uk)

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-9 OCT 2018

## Thomas & Co Financial Services

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### CUSTOMER SURVEY

Please rate the following points from 0 to 10 where 10 is best

How clearly did we present the services we offer?	7
Do we answer calls promptly and efficiently?	9
Do we get back to you when promised?	10
Do we make things easy to understand?	7
Do we process your business quickly and efficiently?	9
Do we keep you informed?	9
Do we spend enough time with you finding out about your needs?	7
Do we spend enough time explaining how things work and the risks involved?	5
Do we present ourselves in an open and honest way?	8
Are our fees in accordance with your expectations?	10
What overall score do you think we deserve?	9

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#### Comments

Name (optional) \_\_\_\_\_

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**CUSTOMER SURVEY**

**Please rate the following points from 0 to 10 where 10 is best**

How clearly did we present the services we offer?	10
Do we answer calls promptly and efficiently?	10
Do we get back to you when promised?	10
Do we make things easy to understand?	10
Do we process your business quickly and efficiently?	10
Do we keep you informed?	10
Do we spend enough time with you finding out about your needs?	10+
Do we spend enough time explaining how things work and the risks involved?	10
Do we present ourselves in an open and honest way?	10
Are our fees in accordance with your expectations?	9
What overall score do you think we deserve?	10

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**Comments**

So far so good!  
Practically perfect in every way!

Name (optional) \_\_\_\_\_

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- 9 OCT 2018

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## CUSTOMER SURVEY

Please rate the following points from 0 to 10 where 10 is best

How clearly did we present the services we offer?	10
Do we answer calls promptly and efficiently?	10
Do we get back to you when promised?	10.
Do we make things easy to understand?	10.
Do we process your business quickly and efficiently?	10.
Do we keep you informed?	9.
Do we spend enough time with you finding out about your needs?	10.
Do we spend enough time explaining how things work and the risks involved?	10.
Do we present ourselves in an open and honest way?	10.
Are our fees in accordance with your expectations?	10.
What overall score do you think we deserve?	10

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# Thomas & Co Financial Services

9 OCT 2018

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## CUSTOMER SURVEY

Please rate the following points from 0 to 10 where 10 is best

How clearly did we present the services we offer?	9
Do we answer calls promptly and efficiently?	9
Do we get back to you when promised?	10
Do we make things easy to understand?	10
Do we process your business quickly and efficiently?	10
Do we keep you informed?	9
Do we spend enough time with you finding out about your needs?	9
Do we spend enough time explaining how things work and the risks involved?	10
Do we present ourselves in an open and honest way?	10
Are our fees in accordance with your expectations?	8
What overall score do you think we deserve?	9

If there is any issue you feel you do not understand or require further clarification on, or wish to make any other comment, please let us know below. Although there is no obligation to put your name on the questionnaire, please bear in mind that we are unable to provide an individual response if you do not.

### Comments

We have been very satisfied with each aspect of business carried out by Thomas & Co.

Name (opt

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**Thomas & Co Financial Services**  
INDEPENDENT FINANCIAL ADVISERS

18 JUL 2018

**CUSTOMER SURVEY**

Please rate the following points from 0 to 10 where 10 is best

How clearly did we present the services we offer?	10
Do we answer calls promptly and efficiently?	10
Do we get back to you when promised?	10
Do we make things easy to understand?	10
Do we process your business quickly and efficiently?	10
Do we keep you informed?	10
Do we spend enough time with you finding out about your needs?	10
Do we spend enough time explaining how things work and the risks involved?	10
Do we present ourselves in an open and honest way?	10
Are our fees in accordance with your expectations?	10
What overall score do you think we deserve?	10

If there is any issue you feel you do not understand or require further clarification on, or wish to make any other comment, please let us know below. Although there is no obligation to put your name on the questionnaire, please bear in mind that we are unable to provide an individual response if you do not.

**Comments** The service I have received has been prompt, professional and presented in a way that made me confident in pursuing the route, which was achieved after a detailed discussion with the advisor, I have no criticism to make.

Name (optional)

ds