



Thomas & Co Financial Services

Part of the Kingswood Group

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

We have been totally satisfied with your services.

Name (option) ..

jrb

18 JUL 2019



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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?	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?	9
What overall score do you think we deserve?	10

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Comments

Name (optional) _____

ds



18 JUL 2019

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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?	9
Do we make things easy to understand?	8
Do we process your business quickly and efficiently?	7
Do we keep you informed?	8
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?	9
Do we present ourselves in an open and honest way?	9
Are our fees in accordance with your expectations?	8
What overall score do you think we deserve?	8.5

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Comments

Sometimes the response has been slow when I have made new investments, but this may be partly due to the fund providers. It would be good to be informed of progress when this happens.

Name (

ds



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

How clearly did we present the services we offer?	8
Do we answer calls promptly and efficiently?	10
Do we get back to you when promised?	10
Do we make things easy to understand?	8
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?	9.5

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Comments

Name (optional)

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Do we get back to you when promised?	10
Do we make things easy to understand?	9
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?	9
Do we spend enough time explaining how things work and the risks involved?	9
Do we present ourselves in an open and honest way?	9
Are our fees in accordance with your expectations?	9
What overall score do you think we deserve?	9

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Comments

Name (optional) _____



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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

WAS VERY HAPPY WITH THE SERVICE AND THE WHOLE THING WENT SMOOTHLY.

Name (optional) _____



09 JUL 2019

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Do we get back to you when promised?	9
Do we make things easy to understand?	8
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?	9
Do we spend enough time explaining how things work and the risks involved?	9
Do we present ourselves in an open and honest way?	9
Are our fees in accordance with your expectations?	7
What overall score do you think we deserve?	9

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Comments

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