**Treating Customers Fairly**

**Feedback Form**

Your help in providing feedback to the Network on the service provided to you

would be very much appreciated.

|  |  |
| --- | --- |
| Client Name(s) |  |
| Adviser Name |  |

Date \_\_\_/\_\_\_/\_\_\_

1. Can you please confirm that you have received your Advisers Business Card, Initial Disclosure Document/Terms of Business, and a Treating Customer Fairly Statement?

Yes/No

1. Products: Which area(s) did your adviser discuss with you?

|  |  |  |
| --- | --- | --- |
|  | Mortgage only | |
|  | Mortgage Protection & General Insurance | |
|  | Investments/Pensions | |
|  | Other, please specify |  |

1. What is your understanding of what was recommended to you and why?
2. How satisfied were you with the depth of knowledge shown by your adviser?

(5 – extremely satisfied, 1 – extremely dissatisfied)

1. How satisfied were you with the level of service you received?

(5 – extremely satisfied, 1 – extremely dissatisfied)

1. What overall impression did you have of your adviser during your meeting(s)?

|  |  |
| --- | --- |
|  | I/We felt reassured |
|  | I/We felt disappointed |
|  | I/We felt pressurised. If you did, please provide more details below. |

1. Before taking up your new product, to what extent do you feel you were encouraged to think sufficiently and carefully about your Adviser’s recommendation?

|  |  |
| --- | --- |
|  | A lot |
|  | To a certain extent |
|  | Not at all |

Your Adviser will send you a letter detailing their advice and the reasons for it (Suitability Report). If you have any questions regarding this report when you receive it, please contact your adviser.

If there are any other comments you wish to make regarding our service and advice please complete the box below.

Thank you for taking the time to provide this feedback.

Please scan and return to:

[tcf@julianharris.net](mailto:tcf@julianharris.net)

or send by post to:

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Julian Harris House

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Ashford

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