

# Wisdom Financial Services

## Client Feedback Form 2017

Wisdom Financial Services  
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Client Name .....

Investment Type .....

Dear

Your feedback and thoughts on the way in which we manage your investments is important to us!!! It would be appreciated if you could take a few minutes to complete the enclosed form. Your response will allow us to improve the quality of the service and advice you receive through this office.

**How would you rate our response time to your general telephone and/or written enquiries?**

Excellent       Good       Adequate       Poor

**Do you feel that we keep you informed on any legislative changes, market movements or industry developments?**

Yes       No

Comments .....

**At the moment, we review your investment every \_\_\_\_\_. Would you like to meet more frequently?**

Yes       No

Comments .....

**Are you happy with the level of information and detail that is covered in your review material?**

Yes       No

**Is there any information you would like to receive during your review and/or throughout the year that you are not receiving at the moment?**

Yes       No

Comments .....

**How would you rate your overall experience when dealing with this office – in terms of our understanding of your circumstances, the advice received, our general knowledge and expertise, our willingness to assist you with your general enquiries etc...**

Excellent       Good       Adequate       Poor

Comments .....

**Since forming a relationship with Wisdom Financial Services, is there anything this office needs to improve on to ensure your investment experience meets your expectations in all respects?**

Yes       No

**Other comments or suggestions**

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