

## Treating Customers Fairly Survey

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Our promise to you is that we will always treat you fairly. You can expect in all our dealings with you that we will:

- treat you as we would expect to be treated
- never take advantage of you
- be open and honest
- quickly put right any mistake that we make

Are we keeping our promise? Please take a few moments to let us know how we're doing. Please rate each of the following against a scale where:

5= Strongly Agree, 4= Agree, 3= Partially Agree, 2= Disagree, 1= Strongly Disagree

		Rating	Additional Comments
1.	My adviser took the time to understand my circumstances and my financial needs		
2.	The advice my adviser gave me was clear and easy to understand		
3.	The product or service my adviser recommended met my needs		
4.	The written information I received from my adviser was clear and easy to follow		
5.	My adviser explained the cost of the advice to me		
6.	My adviser was easy to contact and available to help me with queries when required		
7.	My adviser treated me in a friendly, courteous and helpful manner		
8.	My adviser contacts me on a regular basis to review my needs		
9.	I would recommend my adviser to a friend		
10.	My adviser kept the Intrinsic Customer Promise in all dealings with me		

Thank you for completing this survey.

Name.....

Adviser's Name.....

Signed.....

Date.....

Please Post or Fax this to the numbers or address details as above.



## EXPRESS CONSENT FORM

### Let us keep you informed

New government legislation from 1<sup>st</sup> November 2004 means that the Financial Services Authority will regulate all mortgage sales. This will impose certain restrictions on when and how we can contact our existing clients. We would like to continue looking after your mortgage affairs in the months and years ahead and we now need to obtain your permission to continue to review your affairs and to keep you informed of products and deals which may be suitable to you as and when they come on to the market.

### What you need to do

We pride ourselves in providing a high quality service to our clients and trust our service to you has been of a sufficiently high standard to encourage you to form a long standing relationship with us. Therefore we would appreciate it if you would take the time to complete the section below to allow us to do this to the best of our abilities.

Client name(s) \_\_\_\_\_

Address \_\_\_\_\_

Post Code \_\_\_\_\_ Tel. No. \_\_\_\_\_

I/we hereby grant permission to .....to continue to review my/our affairs by way of regular written or verbal contact and to keep me/us informed about products and deals which may be suitable for me/us as and when they come on to the market.

Signed \_\_\_\_\_ Date \_\_\_\_\_

Signed \_\_\_\_\_ Date \_\_\_\_\_