



The Investment
COACH

Constant Contact Survey Results

Survey Name: TCF Questionnaire Nov 2008

Response Status: Partial & Completed

Filter: None

Feb 11, 2010 9:44:56 AM

* Client Name

Answers	Number of Response(s)
First Name	19
Last Name	19
Email Address	19

If you are responding jointly please add the second name

6 Response(s)

* What services or products have you received?

19 Response(s)

* Do you feel that your adviser obtained sufficient information regarding your personal and financial circumstances prior to making a recommendation?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			19	100.0 %
No			0	0.0 %
No Response(s)			0	0.0 %
Totals			19	100%

* Do you feel that you and your adviser fully discussed your understanding of investment risk and that your recorded attitude to risk matches the funds you have chosen?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			19	100.0 %
No			0	0.0 %
No Response(s)			0	0.0 %
Totals			19	100%

* Do you feel that your Adviser explained the product(s) clearly and in terms which you could fully understand?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			19	100.0 %
No			0	0.0 %
No Response(s)			0	0.0 %
Totals			19	100%

* Did you feel that our Adviser was clear in his/her explanations and that you could ask any questions with confidence?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			19	100.0 %
No			0	0.0 %
No Response(s)			0	0.0 %
Totals			19	100%

If you could turn the clock back, what do you think should have been done differently:

- * - by us?
- by yourselves?

19 Response(s)

* Do you see us as a ...

Answer	0%	100%	Number of Response(s)	Response Ratio
Supplier			1	5.2 %
Business/financial life coach			15	78.9 %
Other			3	15.7 %
No Response(s)			0	0.0 %
Totals			19	100%

* Overall, how many marks out of ten would you give us at this moment in time?

1 = 0, 2 = 1, 3 = 2, 4 = 3, 5 = 4, 6 = 5, 7 = 6, 8 = 7, 9 = 8, 10 = 9, 11 = 10

	1	2	3	4	5	6	7	8	9	10	11	Number of Response(s)	Rating Score*
											18	9.9	

*The Rating Score is the weighted average calculated by dividing the sum of all weighted ratings by the number of total responses.

* What do you see as being the big issues for our relationship in the future?

18 Response(s)

* Is there anything on our Suitability Report (this report details our advice) that you did not understand?

Answer	0%	100%	Number of Response(s)	Response Ratio
No			18	94.7 %
Yes (please detail below)			0	0.0 %
No Response(s)			1	5.2 %
Totals			19	100%

We would be grateful if you could take a few moments to let us know any comments that you may have in the box below.

13 Response(s)

* As you can't physically sign this online questionnaire please write below your month of birth as an integrity check?

18 Response(s)

* And finally, an easy one! Please record the date ...

18 Response(s)