



Kent Innovation Centre, Thanet Reach Business Park,
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To enable ABFIM to improve our services to our clients and for us to monitor our on going services to you, we would be grateful if you could take a minute to complete the questionnaire below.
 Please circle the relevant number that you feel is appropriate.

	N/A	Poor	Adequate	Good	Very Good	Excellent
Whenever calling the office, how was your call dealt with?		1	2	3	4	5
What level of knowledge do you feel your Financial Adviser conveyed to you?		1	2	3	4	5
How well did you feel the Adviser took time to understand your needs?		1	2	3	4	5
How well did the Adviser explain how the product worked?		1	2	3	4	5
How well were the charges/fees explained for the service and advice provided?		1	2	3	4	5
How well did the report explain the products recommended to match your needs?		1	2	3	4	5
Do you feel ABFIM's Independent status and Client Agreement were explained clearly to you on your initial meeting?		1	2	3	4	5
Did you feel the back office staff were aware of your circumstances and had a good understanding of your enquiry?		1	2	3	4	5
Overall, do you feel the service provided by ABFIM was in a timely manner?		1	2	3	4	5
How would you rate your overall service from ABFIM Ltd?		1	2	3	4	5
Please use this section to inform us on how you feel we could improve our services or to make any relevant comments:-						

Name: (This is not compulsory)

Date:

Please return in the enclosed Freepost envelope or use the email address above once completed

Thank you for taking the time to complete this short survey

Acorn Bowman Finance & Investment Management Ltd is authorised and regulated by the Financial Services Authority
 Registered office: As above. Registered in England & Wales No. 4452445

Wills are not regulated by the Financial Services Authority



Treating Customers Fairly

- 1) Our Customer Needs**
- 2) Service and Product Design**
- 3) Customer Communication**
- 4) Customer Expectations**
- 5) Employers and Business Partners**
- 6) Disabilities**

1) We develop our services based on a clear understanding of the needs of our customers. We monitor market changes and respond accordingly to help ensure the appropriateness of advice or information provided to our clients.

2) We will provide information and advice on application to customers about the benefits, risks and costs associated with our services and the products we recommend helping clients make an informed decision as to whether to act on information only or the advice we can provide. We will provide appropriate information in a way that aims to be clear, fair and not misleading. The services we can provide are Life Protection, Investments, Pensions, IHT Planning, Mortgages & Loans, ASU, Wills and General Insurance.

3) We will honour the agreements we have with our clients as we expect them to honour ours. Should a complaint or problem arise, whether it is with our company or that of a third party provider, we will endeavour to identify the underlying root cause and help you take action to eliminate it.

4) Our aim is to fulfill our client's expectations by meeting their needs and honour the promises we have made to our customers. We will manage potential conflicts of interest to ensure that they do not lead to customers being treated unfairly.

5) We will communicate our "Treating Customers Fairly" principles to the Employers and Businesses with whom we have a relationship, so that they too can take them into account, in considering the practices they adopt within their business. We will provide the employers with appropriate information on our services and products we have recommended in order that they may help their staff appropriately.

6) We wish to treat all clients with the respect due to them. We believe the importance of avoiding social exclusion and will actively put into practice the principles of the disability discrimination act. If you require another person present at your meeting to help assist you, or you are unable to visit our office, a home visit can easily be arranged. The facilities at our office are fully equipped for people who maybe wheelchair bound or have any other form of disability.

We are here to ensure you achieve your goals and guide you through life's ups and downs.

Yours sincerely