

## Client Feedback Form

What you think about what we do matters to us.

We want to know whether we have answered all of your questions and explained everything clearly during meetings with you. We want to know what we can do better for the future and whether there is anything you want us to do that we do not currently do.

We would be grateful if you could take a few minutes to share with us your comments, ideas, suggestions and any criticisms you may have so that we can improve upon the service we offer you.

All comments are gratefully received, whether they are positive or negative. We appreciate your time and thank you for continuing to work with NW Brown.

### Please rate your experience

Did our adviser fully explain the services we offer?

Yes  No Other

Did our adviser fully explain our fee structure?

Yes  No Other

Did our adviser fully understand your financial objectives?

Yes  No Other

Did we explain to your satisfaction how investments and other products work?

Yes  No Other

Did you fully understand our explanation of attitude to risk and capacity for loss?

Yes  No Other

Did we answer all of your questions and concerns to your complete satisfaction?

Yes  No Other

Was the correspondence you received from us, by email or by post, of a high standard?

Yes  No Other

Have we met your expectations of a high quality wealth manager?

Yes

No

Other

Would you recommend our services as a wealth manager to your family and friends?

Yes

No

Other

Is there anything you would like to share with us about our services or our approach to wealth management?

Name

Email

Contact number

NW Brown are committed to supporting local sports and culture and where possible we like to invite our clients to enjoy these events, are you interested in:

Charitable works

Golf

Sport / Other - please specify:

The Arts

Food & Drink