



Wellbank Financial Services
Mortgage & Insurance –
Customer Feedback Survey

Thank you for choosing WELLBANK FINANCIAL Mortgage where we aim to provide you with a fair, efficient and courteous service at all times - together with clear information about the products and type of service we offer. To help us monitor our performance - and identify any areas for improvement – we'd be grateful if you would take a moment to complete our confidential customer survey. Please return the survey to...Wellbank financial TCF 110 manchester road haslingden rossendlae bb4 6np.

Please tick one answer from each question that is relevant to you:

How did we perform? (all clients)

1. How courteous was/were the staff member/s you dealt with?

- Not courteous
- Courteous
- Very courteous

2. How confident were you in the knowledge of the sales consultant you dealt with?

- Not confident
- Confident
- Very confident

3. How well did we keep you updated about the progress of your case?

- Not very well – I felt the need to chase
- Well – I felt no need to chase
- Very well – you exceeded my expectations

4. How easy was it for you to contact us to discuss your case?

- Not easy
- Easy
- Not applicable

5. How efficiently did you feel that your case was dealt with?

- Inefficiently
- Reasonably efficiently
- Efficiently

6. If a problem occurred, did we rectify it satisfactorily?

- Yes
- No
- Not applicable

How well did we explain things? (all applicants)

By answering the following questions you'll help us assess the clarity of our marketing and sales literature and identify any areas for improvement.

7. Did you receive a written explanation of the type and cost of service we offer?

- Yes
- No
- Not sure

8. What type of service do you think we offered you?

- Advice and a recommendation
- Information only – I made the final choice
- Not sure

9. How do you think we charged you for our service?

- There was no charge – your firm received a commission from the mortgage/product provider instead
- I paid a fee for your time and/or advice and you refunded all of any commission from the product provider to me
- I paid you a fee and you also received a broker commission
- Not sure

10. Did you receive a written explanation of the key features and cost of the **mortgage** you bought?

- Yes
- No
- Not sure

11. How clear did you find the above literature? (please use the comments page at the end to expand if you feel the literature could be improved)

- Unclear
- Reasonably clear
- Very clear

12. Did you choose to take out any additional products through us?

- Yes (please complete questions 13-15 where relevant)
- No (please skip to question 16)

13. **Mortgage Payment Protection Insurance** - sometimes called MPPI or Accident, Sickness or Unemployment (ASU) insurance

Was a policy summary document explaining the key features and cost of the insurance issued and discussed with you?

- YES / NO

Were you offered the choice of paying monthly or with a single upfront payment?

- YES / NO

Was the policy fully explained to you?

- YES / NO

If you answered NO or NOT sure to any of the above please call us on 01706218835 to discuss or provide your phone number to enable us to contact you.

14. Buildings insurance

Was a Policy Schedule/Booklet issued and discussed with you?

- YES / NO

Was the policy fully explained to you?

- YES / NO

If you answered NO to either of the above, please call us on 01706218835 to discuss, or provide your phone number to enable us to contact you.

15. Life insurance

Was a policy summary document explaining the key features and cost of the insurance issued and discussed with you?

- YES / NO

Was the policy fully explained to you?

- YES / NO

If you answered NO or NOT SURE to any of the above please call us on 01706218835 to discuss or provide your phone number to enable us to contact you.

16. Thinking about the overall level of service we provided, is wellbank financial a firm that you would recommend if asked?

- Yes
- No
- Not sure

Thank you – your feedback is valuable to us.

Please use the spare page overleaf to expand on any of the points above or to tell us about other areas of our service which you feel could be improved or where you feel we did well.

If you'd like us to contact you regarding your feedback, please tell us the best time/method to reach you.

Additional comments- use separate sheet if necessary.