



Thomas & Co Financial Services
INDEPENDENT FINANCIAL ADVISERS

24 JUN 2014

Customer Survey

Please rate the following points from 0 to 10 where 10 is best*

*Where you score 5 or less please complete the comments section below with reasons

How did we present the services we offer?	8
Do we answer calls promptly and efficiently?	10
Do we get back to you when promised?	10
Do we make things easy to understand?	9
Do we process your business quickly and efficiently?	9
Do we keep you informed?	9
Do we spend enough time finding out about your needs?	10
Do we spend enough time explaining how things work and the risks involved?	10
Do we present ourselves in an open and honest way?	10
Do we give value for money?	Cannot comment yet until we get further into the investment!
What overall score do you think we deserve?	9

If there is any issue you feel you do not understand or require further clarification on, or you wish to make any other comment, please let us know below. Although there is no obligation to put your name on the questionnaire, please bear in mind that we are unable to provide an individual response if you do not.

Comments:

Graham was friendly and knowledgeable and took time to meet us a few times. We felt comfortable to decide to invest through Thomas & Co.

Name (optional)

.....

gu0906



Thomas & Co Financial Services

INDEPENDENT FINANCIAL ADVISERS

Customer Survey

Please rate the following points from 0 to 10 where 10 is best*

*Where you score 5 or less please complete the comments section below with reasons

How did we present the services we offer?	10
Do we answer calls promptly and efficiently?	10
Do we get back to you when promised?	10
Do we make things easy to understand?	10
Do we process your business quickly and efficiently?	10
Do we keep you informed?	10
Do we spend enough time finding out about your needs?	10
Do we spend enough time explaining how things work and the risks involved?	10
Do we present ourselves in an open and honest way?	10
Do we give value for money?	10
What overall score do you think we deserve?	10

If there is any issue you feel you do not understand or require further clarification on, or you wish to make any other comment, please let us know below. Although there is no obligation to put your name on the questionnaire, please bear in mind that we are unable to provide an individual response if you do not.

Comments:

Name (optional) _____

gh0906



Thomas & Co Financial Services

INDEPENDENT FINANCIAL ADVISERS

Customer Survey

Please rate the following points from 0 to 10 where 10 is best*

*Where you score 5 or less please complete the comments section below with reasons.

How did we present the services we offer?	10
Do we answer calls promptly and efficiently?	10
Do we get back to you when promised?	10
Do we make things easy to understand?	10
Do we process your business quickly and efficiently?	10
Do we keep you informed?	10
Do we spend enough time finding out about your needs?	10
Do we spend enough time explaining how things work and the risks involved?	10
Do we present ourselves in an open and honest way?	10
Do we give value for money?	10
What overall score do you think we deserve?	10

If there is any issue you feel you do not understand or require further clarification on, or you wish to make any other comment, please let us know below. Although there is no obligation to put your name on the questionnaire, please bear in mind that we are unable to provide an individual response if you do not.

Comments:

Excellent service.

Name (optional)

p0906



Thomas & Co Financial Services
INDEPENDENT FINANCIAL ADVISERS

- 2 JUN 2014

Customer Survey

Please rate the following points from 0 to 10 where 10 is best*

***Where you score 5 or less please complete the comments section below with reasons**

How did we present the services we offer?	10
Do we answer calls promptly and efficiently?	10
Do we get back to you when promised?	10
Do we make things easy to understand?	10
Do we process your business quickly and efficiently?	10
Do we keep you informed?	10
Do we spend enough time finding out about your needs?	10
Do we spend enough time explaining how things work and the risks involved?	10
Do we present ourselves in an open and honest way?	10
Do we give value for money?	10
What overall score do you think we deserve?	10

If there is any issue you feel you do not understand or require further clarification on, or you wish to make any other comment, please let us know below. Although there is no obligation to put your name on the questionnaire, please bear in mind that we are unable to provide an individual response if you do not.

Comments:

Name (optional)

D. -

gh0906



Thomas & Co Financial Services
INDEPENDENT FINANCIAL ADVISERS

28 MAY 2014

Customer Survey

Please rate the following points from 0 to 10 where 10 is best*

*Where you score 5 or less please complete the comments section below with reasons

How did we present the services we offer?	8
Do we answer calls promptly and efficiently?	10
Do we get back to you when promised?	10
Do we make things easy to understand?	10
Do we process your business quickly and efficiently?	10
Do we keep you informed?	7
Do we spend enough time finding out about your needs?	8
Do we spend enough time explaining how things work and the risks involved?	9
Do we present ourselves in an open and honest way?	10
Do we give value for money?	8
What overall score do you think we deserve?	9

If there is any issue you feel you do not understand or require further clarification on, or you wish to make any other comment, please let us know below. Although there is no obligation to put your name on the questionnaire, please bear in mind that we are unable to provide an individual response if you do not.

Comments:

Name (optional) _____

gc0906



Thomas & Co Financial Services

INDEPENDENT FINANCIAL ADVISERS

Customer Survey

21 MAY 2014

Please rate the following points from 0 to 10 where 10 is best*

*Where you score 5 or less please complete the comments section below with reasons

How did we present the services we offer?	10
Do we answer calls promptly and efficiently?	10
Do we get back to you when promised?	10
Do we make things easy to understand?	10
Do we process your business quickly and efficiently?	10
Do we keep you informed?	10
Do we spend enough time finding out about your needs?	10
Do we spend enough time explaining how things work and the risks involved?	10
Do we present ourselves in an open and honest way?	10
Do we give value for money?	9
What overall score do you think we deserve?	10

If there is any issue you feel you do not understand or require further clarification on, or you wish to make any other comment, please let us know below. Although there is no obligation to put your name on the questionnaire, please bear in mind that we are unable to provide an individual response if you do not.

Comments:

A valuable service, well researched,
& presented all the info & options
clearly.

Name (optional)

jb0906



Thomas & Co Financial Services
INDEPENDENT FINANCIAL ADVISERS

19 MAY 2014

Customer Survey

Please rate the following points from 0 to 10 where 10 is best*

*Where you score 5 or less please complete the comments section below with reasons

How did we present the services we offer?	9
Do we answer calls promptly and efficiently?	9
Do we get back to you when promised?	9
Do we make things easy to understand?	9
Do we process your business quickly and efficiently?	9
Do we keep you informed?	9
Do we spend enough time finding out about your needs?	9
Do we spend enough time explaining how things work and the risks involved?	9
Do we present ourselves in an open and honest way?	9
Do we give value for money?	See Comments ?
What overall score do you think we deserve?	9

If there is any issue you feel you do not understand or require further clarification on, or you wish to make any other comment, please let us know below. Although there is no obligation to put your name on the questionnaire, please bear in mind that we are unable to provide an individual response if you do not.

Comments:

It is difficult to answer the question "Do we give value for money?" on the limited evidence available so far.

Name (optional) _____

gh0906



Thomas & Co Financial Services
INDEPENDENT FINANCIAL ADVISERS

12 MAY 2014

Customer Survey

Please rate the following points from 0 to 10 where 10 is best*

*Where you score 5 or less please complete the comments section below with reasons

How did we present the services we offer?	9
Do we answer calls promptly and efficiently?	10
Do we get back to you when promised?	10
Do we make things easy to understand?	8
Do we process your business quickly and efficiently?	10
Do we keep you informed?	10
Do we spend enough time finding out about your needs?	10
Do we spend enough time explaining how things work and the risks involved?	10
Do we present ourselves in an open and honest way?	10
Do we give value for money?	9
What overall score do you think we deserve?	10

If there is any issue you feel you do not understand or require further clarification on, or you wish to make any other comment, please let us know below. Although there is no obligation to put your name on the questionnaire, please bear in mind that we are unable to provide an individual response if you do not.

Comments:

Name (optional) _____

js0906



Thomas & Co Financial Services
INDEPENDENT FINANCIAL ADVISERS

12 MAY 2014

Customer Survey

Please rate the following points from 0 to 10 where 10 is best*

*Where you score 5 or less please complete the comments section below with reasons

How did we present the services we offer?	9
Do we answer calls promptly and efficiently?	9
Do we get back to you when promised?	9
Do we make things easy to understand?	9
Do we process your business quickly and efficiently?	9
Do we keep you informed?	9
Do we spend enough time finding out about your needs?	9
Do we spend enough time explaining how things work and the risks involved?	9
Do we present ourselves in an open and honest way?	9
Do we give value for money?	9
What overall score do you think we deserve?	9

If there is any issue you feel you do not understand or require further clarification on, or you wish to make any other comment, please let us know below. Although there is no obligation to put your name on the questionnaire, please bear in mind that we are unable to provide an individual response if you do not.

Comments:

Name (optional) _____

gs0906



Thomas & Co Financial Services
INDEPENDENT FINANCIAL ADVISERS

12 MAY 2014

Customer Survey

Please rate the following points from 0 to 10 where 10 is best*

*Where you score 5 or less please complete the comments section below with reasons

How did we present the services we offer?	10
Do we answer calls promptly and efficiently?	10
Do we get back to you when promised?	10
Do we make things easy to understand?	10
Do we process your business quickly and efficiently?	10
Do we keep you informed?	10
Do we spend enough time finding out about your needs?	10
Do we spend enough time explaining how things work and the risks involved?	10
Do we present ourselves in an open and honest way?	10
Do we give value for money?	10
What overall score do you think we deserve?	10

If there is any issue you feel you do not understand or require further clarification on, or you wish to make any other comment, please let us know below. Although there is no obligation to put your name on the questionnaire, please bear in mind that we are unable to provide an individual response if you do not.

Comments:

Name (optional) _____

gh0906



Thomas & Co Financial Services
INDEPENDENT FINANCIAL ADVISERS

12 MAY 2014

Customer Survey

Please rate the following points from 0 to 10 where 10 is best*

*Where you score 5 or less please complete the comments section below with reasons

How did we present the services we offer?	10
Do we answer calls promptly and efficiently?	10
Do we get back to you when promised?	10
Do we make things easy to understand?	10
Do we process your business quickly and efficiently?	10
Do we keep you informed?	10
Do we spend enough time finding out about your needs?	10
Do we spend enough time explaining how things work and the risks involved?	10
Do we present ourselves in an open and honest way?	10
Do we give value for money?	10
What overall score do you think we deserve?	10

If there is any issue you feel you do not understand or require further clarification on, or you wish to make any other comment, please let us know below. Although there is no obligation to put your name on the questionnaire, please bear in mind that we are unable to provide an individual response if you do not.

Comments:

Name (optional)

J

gh0906



Thomas & Co Financial Services
INDEPENDENT FINANCIAL ADVISERS

Customer Survey

Please rate the following points from 0 to 10 where 10 is best*

*Where you score 5 or less please complete the comments section below with reasons

How ^{clearly?} did we present the services we offer? ^	8
Do we answer calls promptly and efficiently?	9
Do we get back to you when promised?	10
Do we make things easy to understand?	10
Do we process your business quickly and efficiently?	9
Do we keep you informed?	8
X Do we spend enough time ^{with you} finding out about your needs? ^	8
Do we spend enough time explaining how things work and the risks involved?	10
Do we present ourselves in an open and honest way?	10
Do we give value for money?	7
What overall score do you think we deserve?	

If there is any issue you feel you do not understand or require further clarification on, or you wish to make any other comment, please let us know below. Although there is no obligation to put your name on the questionnaire, please bear in mind that we are unable to provide an individual response if you do not.

Comments:

Name (optional)

Al i c

gh0906



Thomas & Co Financial Services

INDEPENDENT FINANCIAL ADVISERS

Customer Survey

Please rate the following points from 0 to 10 where 10 is best*

*Where you score 5 or less please complete the comments section below with reasons

How did we present the services we offer?	8
Do we answer calls promptly and efficiently?	9
Do we get back to you when promised?	8
Do we make things easy to understand?	8
Do we process your business quickly and efficiently?	8
Do we keep you informed?	9
Do we spend enough time finding out about your needs?	9
Do we spend enough time explaining how things work and the risks involved?	8
Do we present ourselves in an open and honest way?	9
Do we give value for money?	7
What overall score do you think we deserve?	8

If there is any issue you feel you do not understand or require further clarification on, or you wish to make any other comment, please let us know below. Although there is no obligation to put your name on the questionnaire, please bear in mind that we are unable to provide an individual response if you do not.

Comments:

Difficult to compare VFM, this mark does not indicate dissatisfaction merely accepts room for further challenges!

Name (optional) _____

gs0906



Thomas & Co Financial Services

INDEPENDENT FINANCIAL ADVISERS

Customer Survey

- 6 APR 2014

Please rate the following points from 0 to 10 where 10 is best*

*Where you score 5 or less please complete the comments section below with reasons

How did we present the services we offer?	9
Do we answer calls promptly and efficiently?	9
Do we get back to you when promised?	10
Do we make things easy to understand?	9
Do we process your business quickly and efficiently?	9
Do we keep you informed?	9
Do we spend enough time finding out about your needs?	9
Do we spend enough time explaining how things work and the risks involved?	9
Do we present ourselves in an open and honest way?	9
Do we give value for money?	9
What overall score do you think we deserve?	9

If there is any issue you feel you do not understand or require further clarification on, or you wish to make any other comment, please let us know below. Although there is no obligation to put your name on the questionnaire, please bear in mind that we are unable to provide an individual response if you do not.

Comments:

I have given 9 out of 10 because I am a hardmarker and believe that no one is perfect. However, I am very happy with the service I get from Joe, who is very professional, helpful and responsive.

Name (optional) _____

J/50906



Thomas & Co Financial Services
INDEPENDENT FINANCIAL ADVISERS

- 3 APR 2014

Customer Survey

Please rate the following points from 0 to 10 where 10 is best*

*Where you score 5 or less please complete the comments section below with reasons

How did we present the services we offer?	10
Do we answer calls promptly and efficiently?	8
Do we get back to you when promised?	10
Do we make things easy to understand?	10
Do we process your business quickly and efficiently?	10
Do we keep you informed?	10
Do we spend enough time finding out about your needs?	10
Do we spend enough time explaining how things work and the risks involved?	10
Do we present ourselves in an open and honest way?	10
Do we give value for money?	10
What overall score do you think we deserve?	9

If there is any issue you feel you do not understand or require further clarification on, or you wish to make any other comment, please let us know below. Although there is no obligation to put your name on the questionnaire, please bear in mind that we are unable to provide an individual response if you do not.

Comments:

Name (optional) _____

jb0906



Thomas & Co Financial Services
INDEPENDENT FINANCIAL ADVISERS

-3 APR 2014

Customer Survey

Please rate the following points from 0 to 10 where 10 is best*

*Where you score 5 or less please complete the comments section below with reasons

How did we present the services we offer?	10
Do we answer calls promptly and efficiently?	10
Do we get back to you when promised?	10
Do we make things easy to understand?	10
Do we process your business quickly and efficiently?	10
Do we keep you informed?	10
Do we spend enough time finding out about your needs?	10
Do we spend enough time explaining how things work and the risks involved?	10
Do we present ourselves in an open and honest way?	10
Do we give value for money?	10
What overall score do you think we deserve?	10

If there is any issue you feel you do not understand or require further clarification on, or you wish to make any other comment, please let us know below. Although there is no obligation to put your name on the questionnaire, please bear in mind that we are unable to provide an individual response if you do not.

Comments:

Name (optional) _____

jb0906



Thomas & Co Financial Services
INDEPENDENT FINANCIAL ADVISERS

- 1 APR 2014

Customer Survey

Please rate the following points from 0 to 10 where 10 is best*

*Where you score 5 or less please complete the comments section below with reasons

How did we present the services we offer?	10
Do we answer calls promptly and efficiently?	10
Do we get back to you when promised?	10
Do we make things easy to understand?	9
Do we process your business quickly and efficiently?	10
Do we keep you informed?	10
Do we spend enough time finding out about your needs?	10
Do we spend enough time explaining how things work and the risks involved?	10
Do we present ourselves in an open and honest way?	10
Do we give value for money?	10
What overall score do you think we deserve?	10

If there is any issue you feel you do not understand or require further clarification on, or you wish to make any other comment, please let us know below. Although there is no obligation to put your name on the questionnaire, please bear in mind that we are unable to provide an individual response if you do not.

Comments:

I think you do a good job attending some very complex issues

Name (optional)

gh0908



Thomas & Co Financial Services
INDEPENDENT FINANCIAL ADVISERS

- 1 APR 2014

Customer Survey

Please rate the following points from 0 to 10 where 10 is best*

*Where you score 5 or less please complete the comments section below with reasons

How did we present the services we offer?	9
Do we answer calls promptly and efficiently?	10
Do we get back to you when promised?	9
Do we make things easy to understand?	9
Do we process your business quickly and efficiently?	9
Do we keep you informed?	9
Do we spend enough time finding out about your needs?	9
Do we spend enough time explaining how things work and the risks involved?	9
Do we present ourselves in an open and honest way?	10
Do we give value for money?	9
What overall score do you think we deserve?	9+

If there is any issue you feel you do not understand or require further clarification on, or you wish to make any other comment, please let us know below. Although there is no obligation to put your name on the questionnaire, please bear in mind that we are unable to provide an individual response if you do not.

Comments:

I have little to find fault with

Name (optional)

jb0905



Thomas & Co Financial Services
INDEPENDENT FINANCIAL ADVISERS

Customer Survey

- 4 MAR 2014

Please rate the following points from 0 to 10 where 10 is best*

*Where you score 5 or less please complete the comments section below with reasons

How did we present the services we offer?	✓
Do we answer calls promptly and efficiently?	✓
Do we get back to you when promised?	✓
Do we make things easy to understand?	✓
Do we process your business quickly and efficiently?	✓
Do we keep you informed?	N/A
Do we spend enough time finding out about your needs?	✓
Do we spend enough time explaining how things work and the risks involved?	✓
Do we present ourselves in an open and honest way?	✓
Do we give value for money?	✓
What overall score do you think we deserve?	8/10

If there is any issue you feel you do not understand or require further clarification on, or you wish to make any other comment, please let us know below. Although there is no obligation to put your name on the questionnaire, please bear in mind that we are unable to provide an individual response if you do not.

Comments:

Name (optional)

gs0906



Thomas & Co Financial Services

INDEPENDENT FINANCIAL ADVISERS

Customer Survey

- 3 FEB 2014

Please rate the following points from 0 to 10 where 10 is best*

*Where you score 5 or less please complete the comments section below with reasons

How did we present the services we offer?	9
Do we answer calls promptly and efficiently?	10
Do we get back to you when promised?	10
Do we make things easy to understand?	10
Do we process your business quickly and efficiently?	10
Do we keep you informed?	10
Do we spend enough time finding out about your needs?	10
Do we spend enough time explaining how things work and the risks involved?	10
Do we present ourselves in an open and honest way?	10
Do we give value for money?	10
What overall score do you think we deserve?	10

If there is any issue you feel you do not understand or require further clarification on, or you wish to make any other comment, please let us know below. Although there is no obligation to put your name on the questionnaire, please bear in mind that we are unable to provide an individual response if you do not.

Comments:

Name (optional) _____

gs0906