

Please let us know about your communication preferences

These answers will help us deliver more relevant and timely services for you

Are you happy with the level of communication you have with us?

- ☐ Yes - it's just right
☐ Yes - but I would be happy with a little more
☐ No - I would prefer more contact
☐ No - I would prefer less contact
☐

Do you prefer primary contact from us via ..

- ☐ Email
☐ Telephone
☐ Text/SMS
☐ Face to face
☐

How valuable would the following services be for you?

| | Not required | Somewhat valuable | Highly valuable | I'm not sure |
|--|-----------------------|-----------------------|-----------------------|-----------------------|
| Online Portal | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Easier acces to update my assets and liabilities | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| More tracking and progress tools | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| More cashflow and budgeting assistance | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| More information on investments | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Any other services or help that you would find useful?

Type here...

Regarding Cyber Security Standards, are you:

- ☐ Confident that we have this under control
☐ Somewhat concerned that it is adequately controlled
☐ Confused and unsure what is appropriate
☐ Carefree and not something I am concerned about
☐

How likely would it be for you to recommend us to Family or Friends?


1 2 3 4 5 6 7 8 9 10
 Not at all likely ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ Extremely likely

Please tell us why you gave that score

Type here...

Is there anything else you would like to let us know?

Type here...



Your Name

First Name

Last Name

Your email address

SUBMIT