



Avery Financial Planning

Feedback Form

At Averys we are committed to providing you with the very best quality advice and service.

In order for us to continually improve our service to you, please take a moment to complete this questionnaire.

Your Name (anonymous if you wish): _____

Date _____

Do you give permission for Averys to use your feedback on a first name only basis as a testimonial for marketing purposes ? ☐ yes
☐ no

1. First, thinking about your overall experience with Averys, how would you rate your satisfaction? (please circle)

Extremely Dissatisfied Satisfied Extremely Satisfied

2. On a scale of 1 – 5 (with 1 being extremely poor & 5 being excellent), How would you rate the performance of Averys in each of the following areas? (please circle)

2.1 Friendliness/ rapport

1 2 3 4 5

2.2 Responsiveness to enquiries and answering questions?

1 2 3 4 5

2.3 Technical expertise

1 2 3 4 5

2.4. How carefully do staff listen to you & explain things in a way that you can easily understand?

1 2 3 4 5

3. With regards to your Statement of Advice, do you feel that your adviser

	No, Definitely not	No, probably not	Undecided	Yes, I think so	Yes, definitely
Has understood your goals and objectives?					
Is warm and genuine					
Is competent & professional					

3.1. Did your Statement of Advice provide you with all the information you required to feel comfortable with the recommendation? If not please advise what you would have liked to have seen included.

☐ Yes

☐ I would have like to have seen the following included:-

3.2. Did your Statement of Advice provide you with a clear idea of how our recommendations can work towards achieving your long term goals and objectives? If not what could have been done to make this clearer?

☐ Yes

☐ No

4. Have you visited our website – www.averys.com.au?

☐ Yes

☐ No

If so, please provide comments on your experience ie:- Is information readily available? Is it easy to navigate around? do you like the look and feel? What enhancements and functionalities would you like to see incorporated?

5. What aspects of Avery Financial Plannings' service delivery do you value most?

6. What aspects of Avery Financial Plannings' service do you think need improvement?

**7. Finally, would you feel comfortable referring friends and family members to Averys?
If so, please provide contact details or feel free to issue them a complimentary
"wealth check" cheque**

**We really appreciate your feedback.
Please feel free to contact us on
(07) 3349 5544 if you have any questions.**

Thank You !