

Frog Financial Management

Make the leap to a better life



Client Survey

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
1. I was given details and received a clear explanation of the services provided and any associated costs early on in the discussions.					
2. I was given the opportunity to provide information about my personal and financial circumstances.					
3. I was asked what my needs and circumstances were regarding the type of protection plan(s) that I wanted.					
4. I was given a clear explanation of how much protection cover I needed.					
5. I was given help in understanding how much I could afford to pay for the protection plan(s).					
6. I was given a 'Key Facts' document and received a clear explanation of costs, benefits, conditions and exclusions of the protection plan(s) that was being recommended to me.					
7. I understood how the features of the protection plan(s) met my needs and objectives.					
8. I received a letter providing me with a clear explanation of the protection advice I had been given.					
9. Service could be improved by...					
10. I would be happy to use this adviser/firm again for financial advice.				Yes	No
11. I would be happy to introduce my friends, family and colleagues to this adviser/firm.				Yes	No

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Client one:

Name: Signature:

Date:

Client two:

Name: Signature:

Date: