

Financial Guidance for Service Personnel and Veterans

FORCES MoneyPlan

Confidential Feedback Form



Personal
Finance
Society
Standards, Professionalism, Trust.



**ARMED FORCES
COVENANT**



Financial Guidance Meeting Feedback

Following your recent consultation, we do hope you found the experience worthwhile. With this in mind, we would value your personal evaluation about both the effectiveness of the initial guidance and the service you have received.

All the information we have requested below is entirely confidential and optional (for example, we do not need your contact details unless of course you wish to add these).

We will use your feedback to ensure the guidance continues to be helpful and effective for future service personnel and veterans requiring generic financial advice.

We would be grateful if you could please send this back to us via Forces MoneyPlan c/o The Chartered Insurance Institute, 20 Fenchurch Street, London, EC3M 3BY or by email: forcesmoneyplan@thepfs.org

1. Name:

2. Address:

3. Type of meeting (i.e. Telephone/Skype/other):

4. Did you find the consultation helpful? (Yes or No)

5. If the initial meeting did not meet your expectations, please let us know how this could be improved:

6. Following the initial generic advice will you go on to seek a further detailed analysis of your personal circumstances? (Yes or No)

7. If yes, will this be via your initial financial guidance adviser or will you seek an independent adviser/firm using the Personal Finance Society's qualified adviser website www.thepfs.org/yourmoney?

8. If you do not require further financial advice or guidance from a qualified financial adviser, will you go on to seek information from other sources i.e. the internet? If yes please specify:

Thank you so much for taking the time to fill in this questionnaire. If you have any other feedback that you feel might help us with future guidance sessions, please feel free to pass on your thoughts.

Kind regards

Forces MoneyPlan
The Personal Finance Society
20 Fenchurch Street
London
EC3M 3BY
forcesmoneyplan@thepfs.org