

**Client(s)** Shailesh Patel & Bhumikaben Patel

**Advisor** Julian Finch

<b>No</b>	<b>Question</b>	<b>Response</b>
<b>1: Questionnaire</b>		
1.1	On a scale of 1 to 5 (1 being very poor, 5 being exceptional), how would you rank your overall experience with me?	5
1.2	What elements of the Service I provided did you like the most?	Structuring our mortgage as per our needs and requirements
1.3	What did you most like about dealing with me?	Pro-activeness and knowledge about various products
1.4	Please rate me on the understanding of your needs.	Excellent
1.5	Please rate me on my knowledge and explanation of the lenders products.	Excellent
1.6	Please rate me on my courtesy and friendliness.	Excellent
1.7	Please rate me on my communication throughout the process.	Excellent
1.8	Would you be interested in knowing more about the other services I provide?	Yes
1.9	How did you hear about me?	Through a real estate agent
1.10	Any other comments including areas I could improve my service?	Suggesting good real estate agents to your clients can be a good option.