

Please take a moment to share your experience
and help us to improve our service

Broker name:

Broker company:

Broker FCA number:

Case number/KFI number:

1. Meeting Expectations

Did we meet your expectations in progressing your application to completion? (please provide an explanation if not)

Yes No

Comments

2. Website and Portal

How helpful did you find our Pure Professional Adviser website?

Not at all helpful Slightly helpful Somewhat helpful Very helpful Extremely helpful

Comments

How helpful did you find our Online Portal?

Not at all helpful Slightly helpful Somewhat helpful Very helpful Extremely helpful

Comments

3. Technology Preferences

Do you use our online case tracker for case updates?

Yes No Don't know about it

Do you use paper or online application forms?

Online Paper Both

Do you use our mobile app?

Yes No Not heard of it

Which sourcing tool do you most commonly use?

Advise Wise Air Sourcing Iress Assureweb Other

If other please specify

4. Literature

How clear and understandable do you find our literature?

	Not at all helpful	Slightly helpful	Somewhat helpful	Very helpful	Extremely helpful
Product document suite					
Product 'At a glance documents'					
Key Features Illustration (KFI)					
Application forms					
Offer Pack					
Marketing toolkit literature					

Is there any other literature we could provide that you would find useful?

5. Communications

How useful do you find our communications?

	Not at all helpful	Slightly helpful	Somewhat helpful	Very helpful	Extremely helpful
Emails					
Social media posts					
Press articles					

Comments

6. Marketing Toolkit

Have you seen our adviser marketing toolkit – If yes, how useful did you find it?

	Not at all helpful	Slightly helpful	Somewhat helpful	Very helpful	Extremely helpful
Digital marketing materials					
Print marketing materials					
Bespoke service with your logo					
The overall service					

Comments

7. Contacting us

If you have contacted us to discuss your case:

How easy was it for you to contact us?

- Not at all easy Slightly easy Somewhat easy Easy Very easy

How helpful were the staff members you dealt with?

- Not at all helpful Slightly helpful Somewhat helpful Very helpful Extremely helpful

Who did you speak to?

- Intermediary Sales Marketing Application Support & Underwriting Customer Account Servicing Unsure

Who is your main intermediary sales team contact?

8. Overall Service

How did you find our overall service?

- Very dissatisfied Somewhat dissatisfied Neither satisfied or dissatisfied Somewhat satisfied Very satisfied

Comments

How likely is it that you would recommend Pure Retirement to an associate or colleague?

- Not very likely Slightly Likely Neither likely or unlikely Fairly Likely Extremely likely

Comments

Is there anything we could be doing better to improve our service to you?

Comments

Thank you for your time

Please return your completed questionnaire to admin@pureretirement.co.uk. We would love to share your comments about our service. Please tick here if you will allow us to use them in our marketing materials. For intermediary use only.

