

FEEDBACK QUESTIONNAIRE

ADVISER

1. HOW MANY CLIENTS...

- DID YOU INTRODUCE FLEXIBLE PLANNED GIVING TO?
- WERE RECEPTIVE TO THE CONCEPT?
- SET UP GIVING PLANS WITH YOUR ASSISTANT'S HELP?
- SET UP GIVING PLANS WITHOUT YOUR ASSISTANCE?

2. FOR THOSE NOT RECEPTIVE, THEIR REASONS IF GIVEN

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3. ANY HICCUPS/FEEDBACK?

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4. DID YOU RECEIVE POSITIVE FEEDBACK FOR INTRODUCING THE CONCEPT?

Y N Comments:

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5. On a scale of 1 to 10 (where 1 is Most Unhelpful and 10 is Most Helpful), rate how helpful you feel the *Flexible Planned Giving* concept has been in providing:

	Most Unhelpful	Most Helpful
a "non-threatening" way of Introducing Philanthropy to clients:	1 2 3 4 5 6 7 8 9 10 n/a	
a way of deepening client relationships	1 2 3 4 5 6 7 8 9 10 n/a	
a way of adding value in areas important to clients.	1 2 3 4 5 6 7 8 9 10 n/a	
a way of preserving on-going fee margins	1 2 3 4 5 6 7 8 9 10 n/a	
a way of distinguishing yourself from peers	1 2 3 4 5 6 7 8 9 10 n/a	
a way of creating favourable "dinner party" stories for clients to share	1 2 3 4 5 6 7 8 9 10 n/a	
a way of engaging with other family members	1 2 3 4 5 6 7 8 9 10 n/a	

6. On a scale of 1 -10 (where 1 is Most Unhelpful and 10 is Most Helpful), how helpful did you find the following:

	Most Unhelpful	Most Helpful
Our Website	1 2 3 4 5 6 7 8 9 10 n/a	
Our Flexible Planned Giving Guide	1 2 3 4 5 6 7 8 9 10 n/a	
Our Donation Planner Tool	1 2 3 4 5 6 7 8 9 10 n/a	
Our Adviser Script	1 2 3 4 5 6 7 8 9 10 n/a	

7. How comfortable were you with the time commitment required of you to learn about Flexible Planned Giving?

Most Unhelpful	Most Helpful
1 2 3 4 5 6 7 8 9 10 n/a	

8. Did it cause any compliance issues? Y N Comments:

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9. What % of clients that you introduced to the concept donated?and why?

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10. Overall, on a scale of 1- 10 (where 1 is worst and 10 best) how would you rate the experience... for you:

Worst	Best
1 2 3 4 5 6 7 8 9 10 n/a	

... for your clients:

1 2 3 4 5 6 7 8 9 10 n/a

11. Reasons for your answer in Q10 above (...or any other comments)

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