

Financial Services Questionnaire



Contact Name

Tel

Company/Organisation

1. What is the name of the partner responsible for Financial Services?

2. Do you have your own 'in-house' financial services division?
Yes No
3. Is it a Partner who handles the Financial Services or a separately employed IFA?
Partner IFA
4. Do you use an external Independent Financial Adviser (IFA) for Financial Services?
Yes No
5. If yes, are you prepared to name them? (If so, please specify)

6. Are you totally happy with your Financial Services arrangements?
Yes No
7. What level of income do you produce from financial services?

8. Do you feel that the level of income from Financial Services is as good as it could be?
Yes No
9. If no, what is your expected level of income from Financial Services?

10. Do you feel restricted in your growth?
Yes No
11. Would you like to have a "no obligation" discussion about your financial services situation with Positive Solutions -2020's chosen future partner?
Yes No
12. Would you like to know what other 2020 firms are doing on financial services matters?
Yes No
13. Would you like all the benefits that Financial Services work can bring whilst avoiding unnecessary cost, risk and pain?
Yes No
14. Would you be interested in attending a seminar on financial services and your options in light of the future regulatory changes?
Yes No
15. Would you like to receive regular updates on financial services issues?
Yes No
16. Are you aware of Positive Solutions services to Accountants?
Yes No
17. Can a Director from Positive Solutions call you?
Yes No
18. Please provide any further information that may prove useful

Thank you for taking the time to complete this questionnaire.

Please return by:

1. Post to 2020 Group, 6110 Knights Court, Solihull Parkway, Birmingham Business Park, Birmingham B37 7WY
2. Fax to +44 (0) 121 314 4718
3. Email to cathy.brennan@the2020group.com