



CLIENT FEEDBACK SURVEY

2024



WOODRUFF
FINANCIAL PLANNING



ABOUT THIS SURVEY

We regularly survey our clients to request their opinion on how we are doing. This takes a number of forms:

- Verbal surveys after initial work
- Testimonials and reviews
- Video feedback
- This survey

This survey was conducted with all current clients online and anonymously in July 2024. Clients were asked to answer 10 multiple-choice questions, and were also given the option to provide voluntary written feedback to 4 further questions. We received responses from 41% of clients.

We take this feedback very seriously, as it allows us to understand if we provide a service that clients value and understand. We have used this feedback to make many improvements to client services and communications.

You can see our client testimonials here:

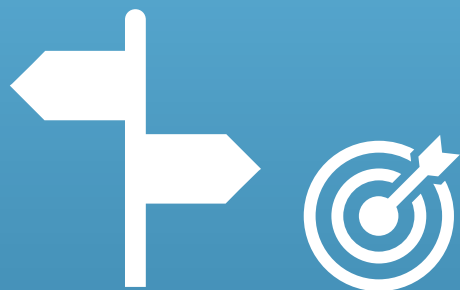
<https://www.woodruff-fp.co.uk/client-testimonials/>

This page has 6 client story videos, along with dozens of written testimonials.

You can also view public reviews on Google and Facebook.

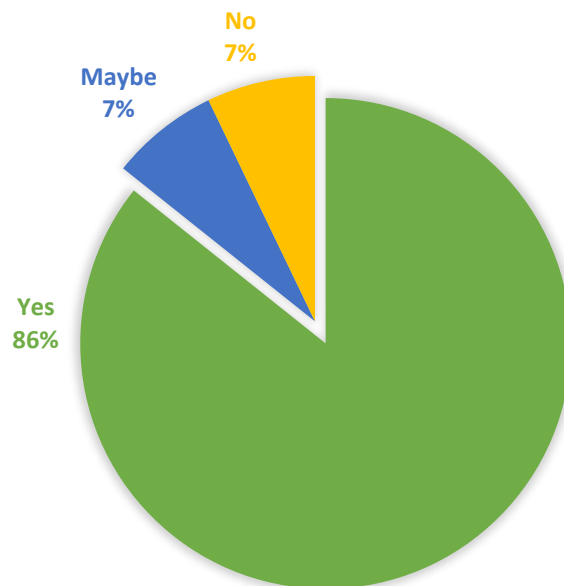
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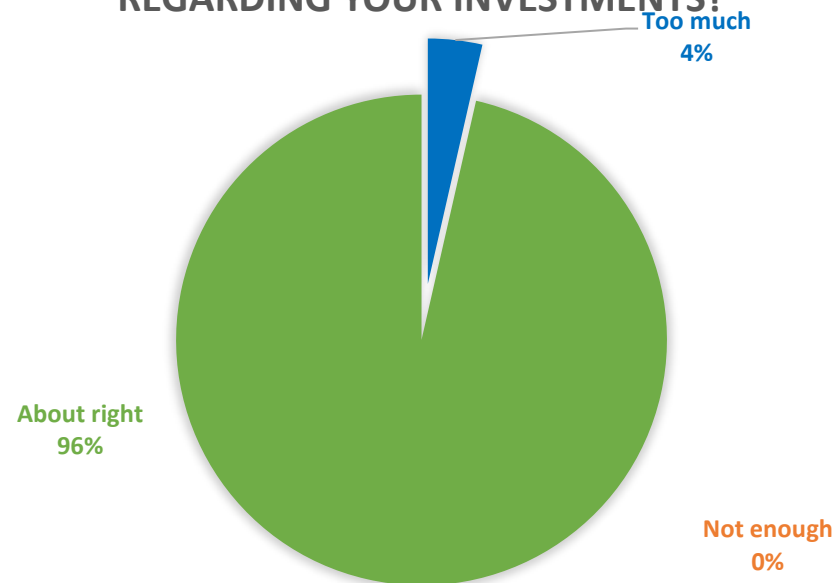


SURVEY RESULTS

DOES FINANCIAL PLANNING HELP YOU TO ACHIEVE YOUR GOALS?

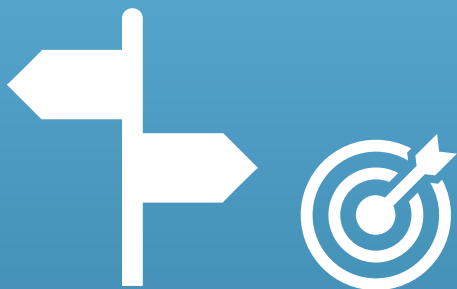


2. DO WE COMMUNICATE ENOUGH REGARDING YOUR INVESTMENTS?



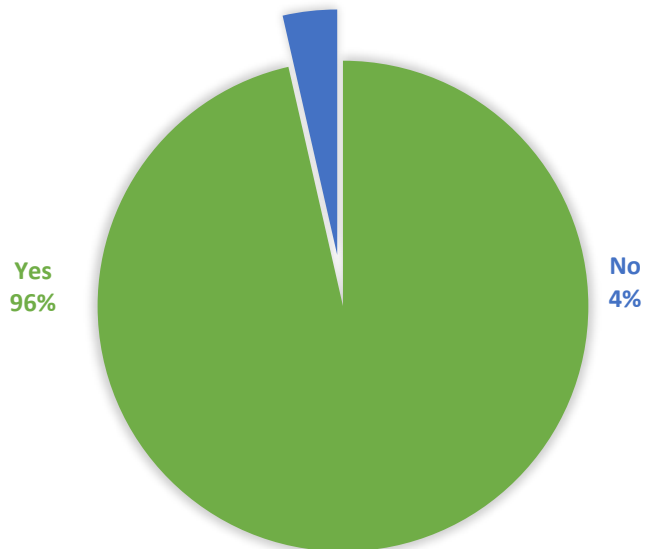
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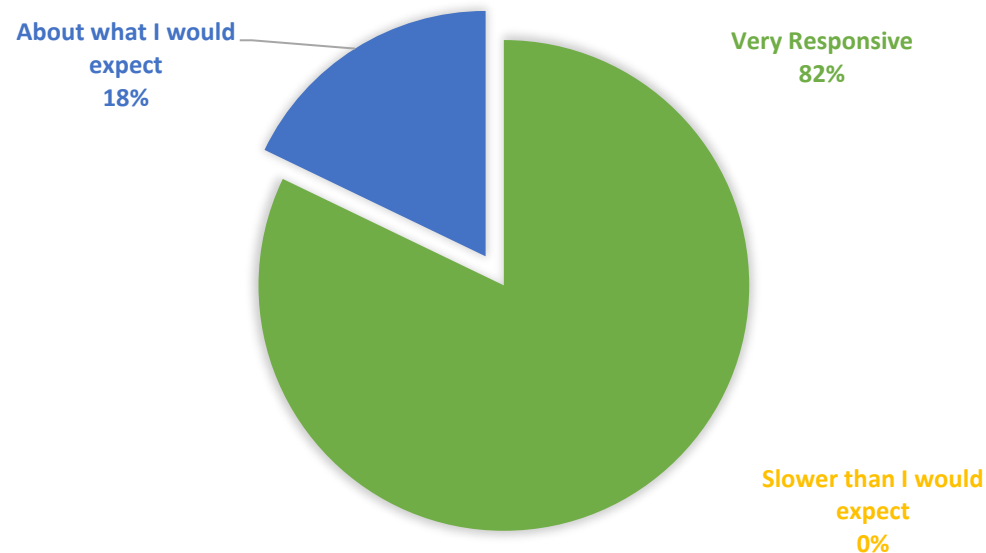


SURVEY RESULTS

3. IS OUR ADVICE EASY TO UNDERSTAND?

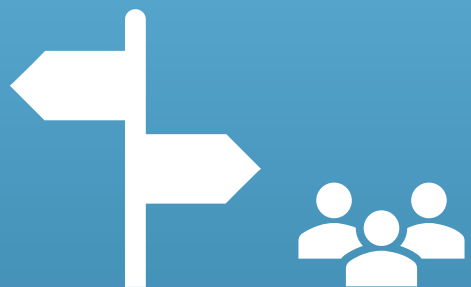


4. HOW RESPONSIVE ARE WE TO YOUR GENERAL QUESTIONS?



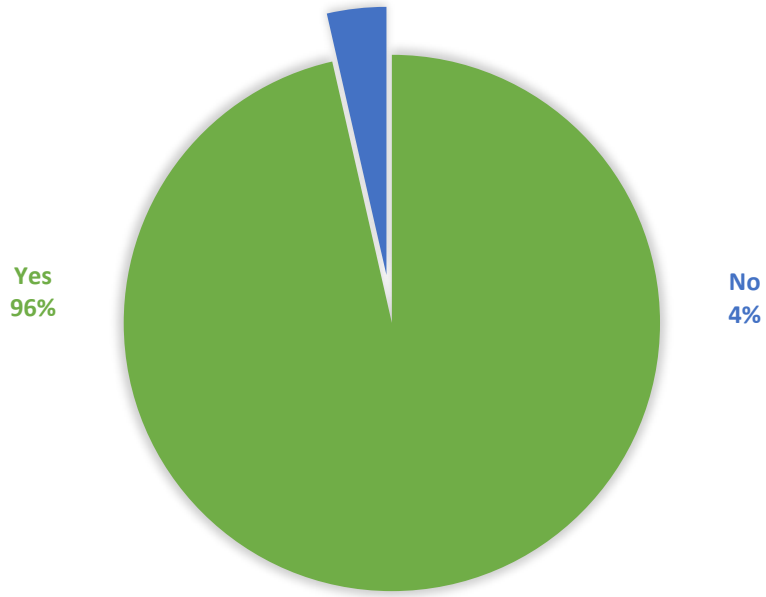
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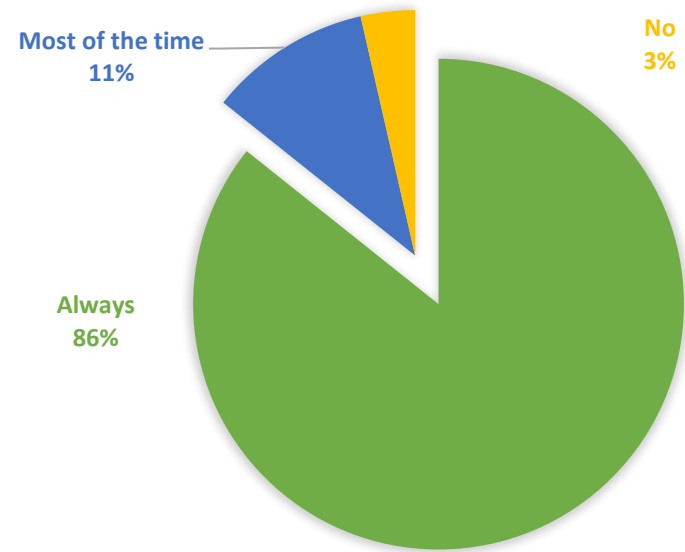


SURVEY RESULTS

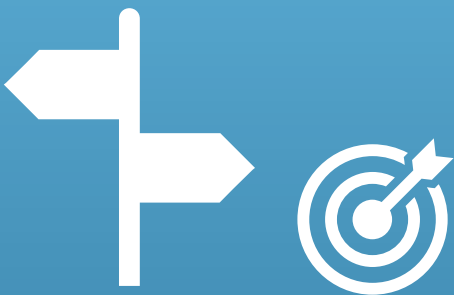
5. DO WE CARE ABOUT YOUR NEEDS?



6. CAN YOU TRUST US TO LOOK AFTER YOUR BEST INTERESTS?

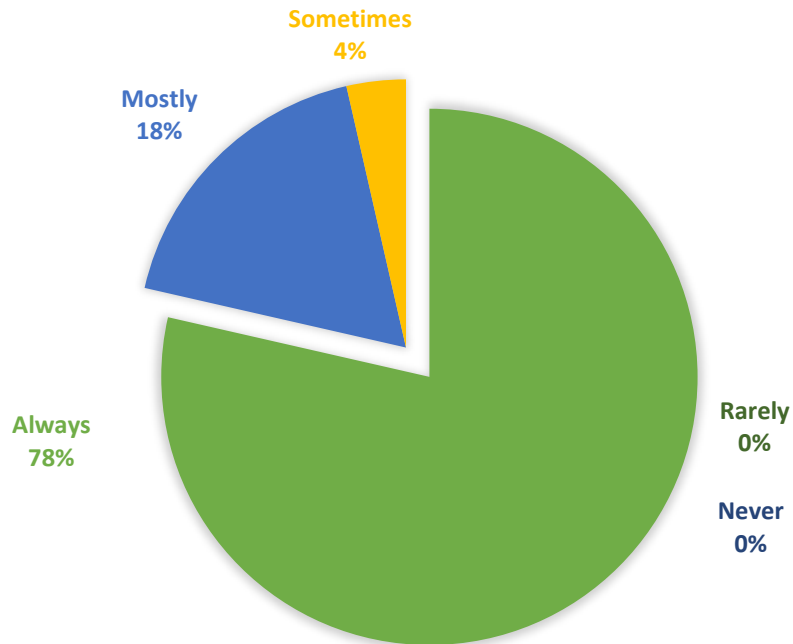


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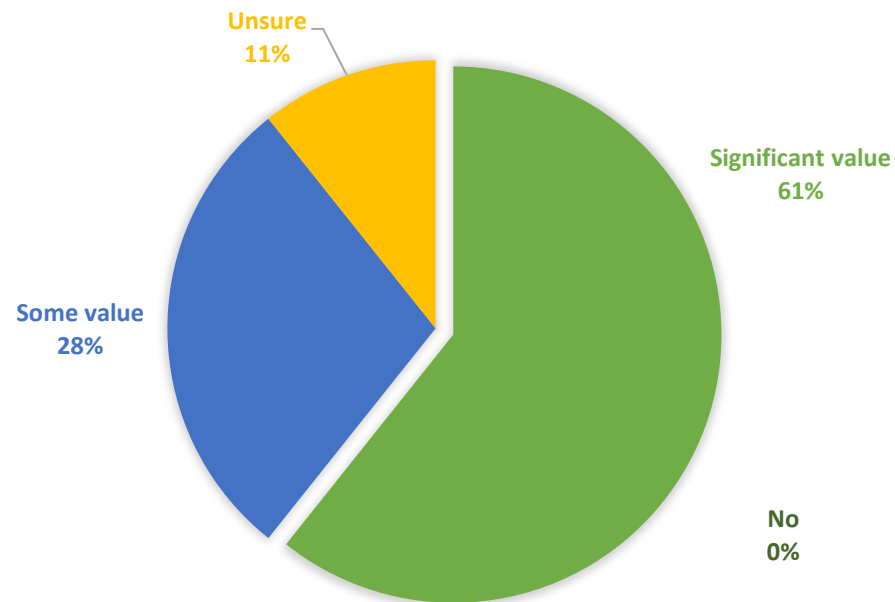


SURVEY RESULTS

7. DO WE DELIVER ON OUR PROMISES?

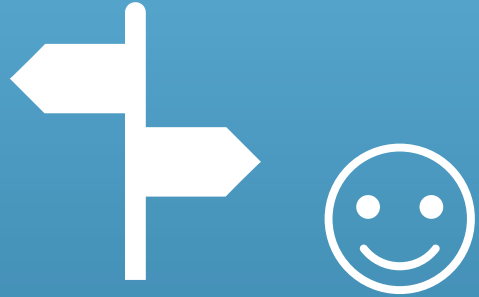


8. DO YOU GET VALUE FROM OUR SERVICE?



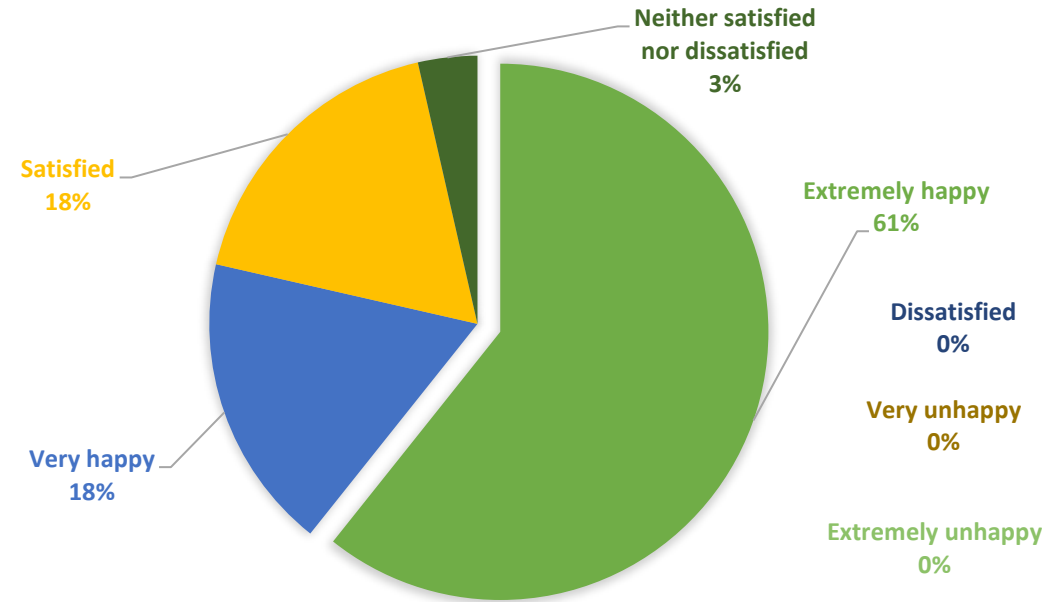
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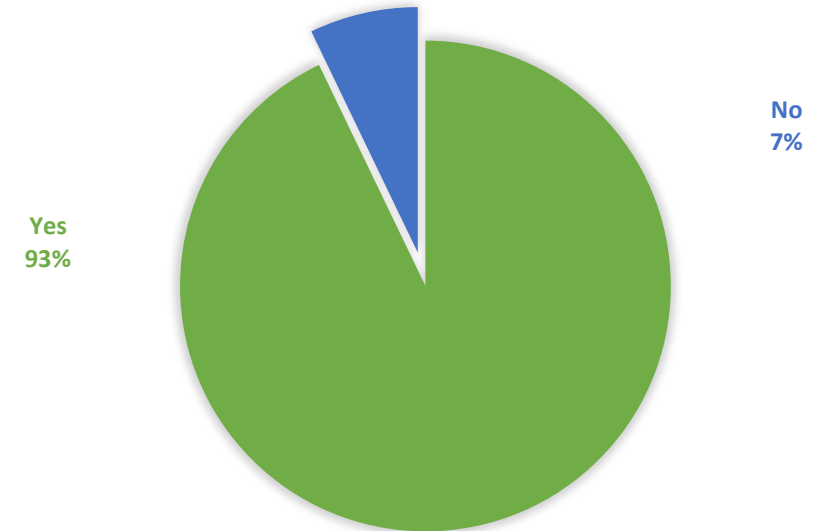


SURVEY RESULTS

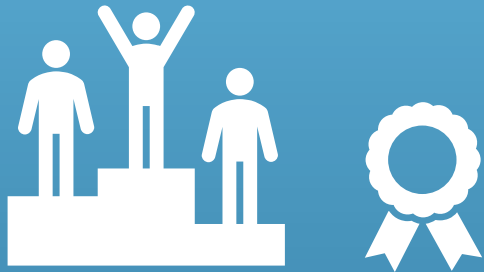
9. HOW SATISFIED ARE YOU WITH OUR SERVICE?



10. WOULD YOU RECOMMEND OUR SERVICE TO A FRIEND?



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WHAT DO WE DO BEST?

What do we do best? Clients had the option to provide written feedback:

"Clear advice and quick responses."

"Very good at chasing up answers and paperwork that I have not supplied!"

"You keep things simple, explain things clearly, and do not use jargon."

"You are good at explaining detail at our level of understanding."

"You are always on hand to answer questions promptly."

"You anticipate actions such as annual contributions to ISAs."

"You explain options available to us in a clear and straightforward way."

"You are always there at the end of the phone to answer my questions."

"You keep it simple and effective."



HOW ARE WE DIFFERENT?

How are we different? Clients had the option to provide written feedback:

"You offer a personal service."

"You have a personalised and very knowledgeable service. We trust your advice."

"You are polite, practical and down-to-earth. You will point out the downside of a decision when necessary."

"It is good to be able to speak to someone rather than an impersonal approach."

"You know about us, our interests, our goals and our requirements."



WHY DID YOU CHOOSE US?

Why did you choose us? Clients had the option to provide written feedback:

"I wanted your one-to-one personal service."

"I was recommended by a family member."

"We were recommended by a professional contact and then we grew to like and trust you."

"We came across you via business networking."

"I watched your YouTube videos online."

"I was recommended to you by a friend."

"I had a useful discussion with you before I was ready to move forward with my pension plans."



WHAT COULD WE DO BETTER?

What could we do better? Clients had the option to provide written feedback: We excluded multiple kind comments where clients stated that nothing came to mind. The comment below is a combination of feedback from multiple sources rather than a direct quote:

“Please could you reduce the need for communications via your secure portal, especially where the message does not contact personal data? We understand the need to use a secure messaging service. However, it can take some time to access the service via the login and it can be frustrating to go to this trouble just to see an acknowledgement that you have received our message.”

We acknowledge that this can be a frustrating experience. We hope that you can understand that we take your data security extremely seriously. We have foiled a past attempt by hacker to access our client’s investments via email. We prefer to use our secure portal for sensitive data for this reason. This service encrypts data and is harder to access by malicious actors because you can use 2-factor authentication.

However, you raise a valid point. It is important for us to make communicating with us as easy as possible. Therefore, we will change our processes to reduce general acknowledgements via the portal. Therefore, you should expect if you receive a notification to access the portal to read a message that this should contain a request for information, an answer to a query, or something useful. If we want to acknowledge receipt of data we will use direct email where possible. We will review this approach in case it encourages you to send us personal data via less sure means!



prosper
Clarity. Focus. Freedom.

Helping you secure your future and
live your dreams



CLARITY

Our Prosper service is designed to help you gain complete clarity over your present and future financial positions. We use our planning software to show you realistic scenarios that illustrate the possible effects that future financial decisions and events might have.

This gives you peace of mind and the confidence to start working towards your goals, safe in the knowledge that you will be financially secure along the way.



FOCUS

When you fully understand where you are now, and where you want to be, you will be able to focus on what truly matters to you.

With this knowledge we can then put together a strategic plan to enable you to make your dream future a reality.

With a comprehensive Financial Plan in place, you will take control of your finances and focus on getting to your goals as quickly as possible.

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FREEDOM

With your financial Plan in place you can sit back and relax, safe in the knowledge that your money is being looked after by regulated experts with a track record for growth and a genuine dedication to customer care.

With the comfort of knowing that you are covered no matter what happens, you will be free to focus on living the life of your dreams.

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Call us today to book a free financial review at our
offices in Colchester, Essex, or via remote meeting



01206 919101



advice@woodruff-fp.co.uk

Click below



GET IN TOUCH

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