



CLIENT FEEDBACK SURVEY

2025



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
- This survey

This survey was conducted with all current clients online and anonymously in September 2025. 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 around 45% of client families.

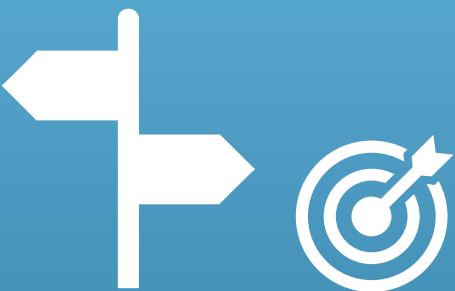
We take this feedback very seriously, as it allows us to understand if we provide a service that clients value and understand. We have used this feedback to make many improvements to client services and communications.

You can see our client testimonials here:

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

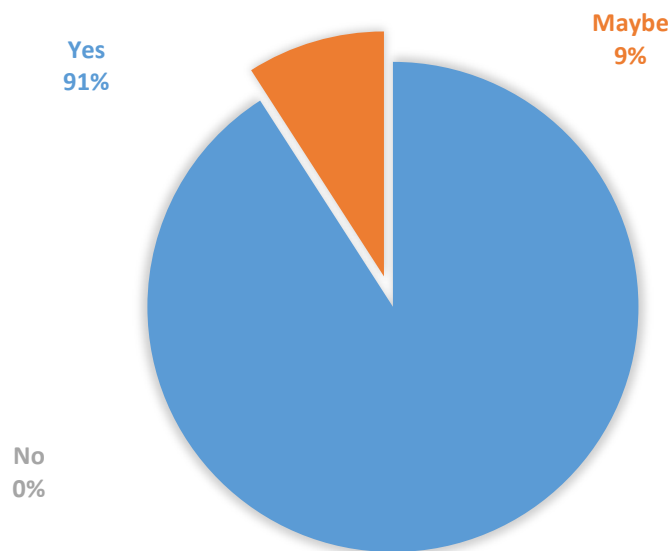
This page has 6 client story videos, along with dozens of written testimonials.

You can also view public reviews on Google and Facebook.

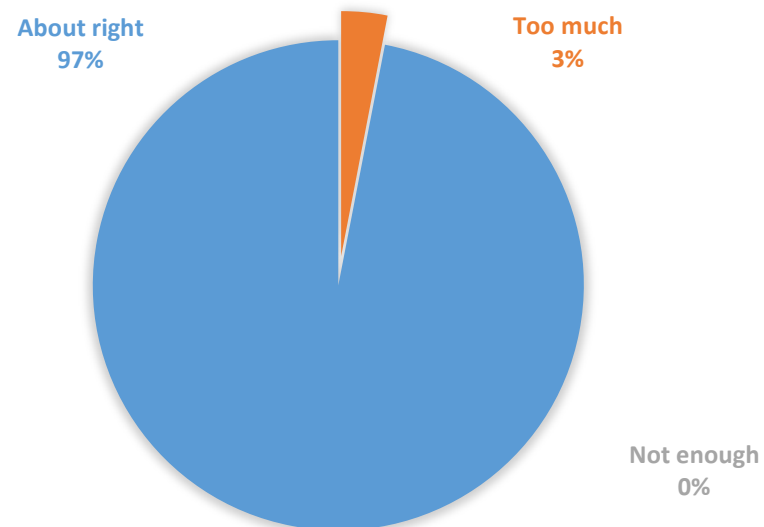


SURVEY RESULTS

1. DOES FINANCIAL PLANNING HELP YOU TO ACHIEVE YOUR GOALS?

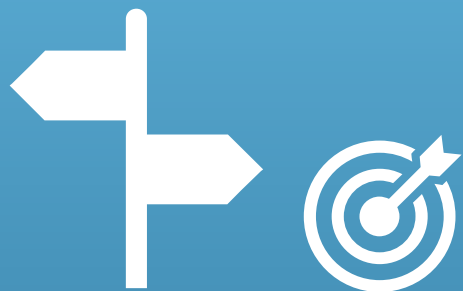


2. DO WE COMMUNICATE ENOUGH REGARDING YOUR INVESTMENTS?



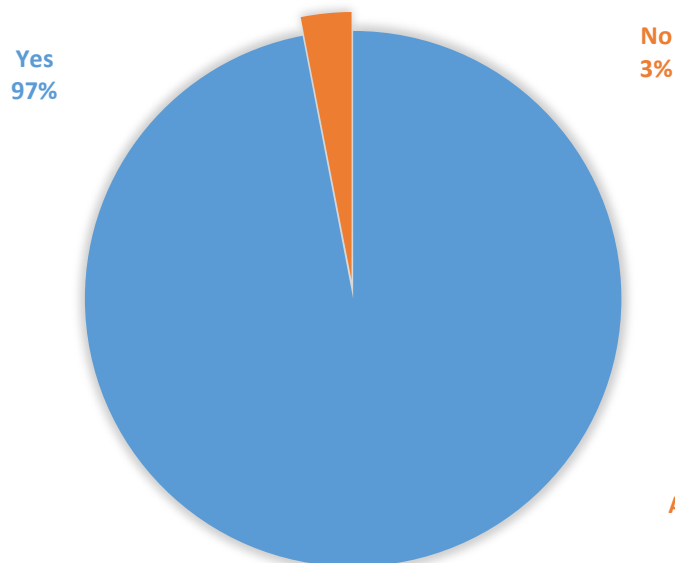
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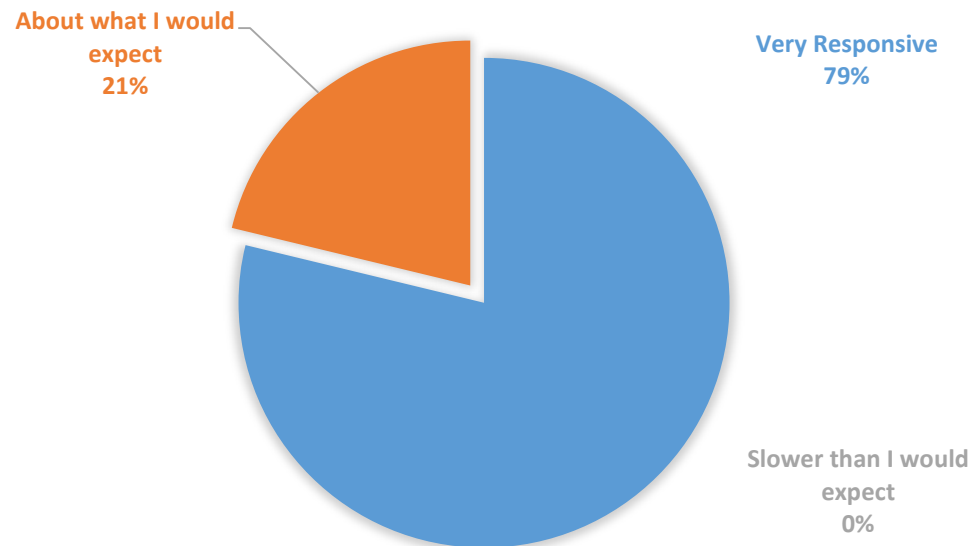


SURVEY RESULTS

3. IS OUR ADVICE EASY TO UNDERSTAND?

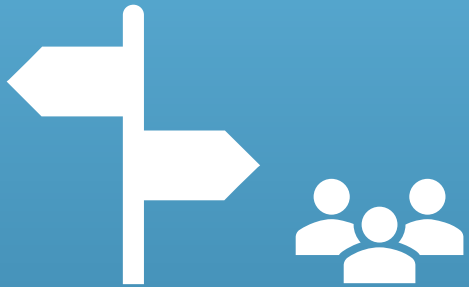


4. HOW RESPONSIVE ARE WE TO YOUR GENERAL QUESTIONS?



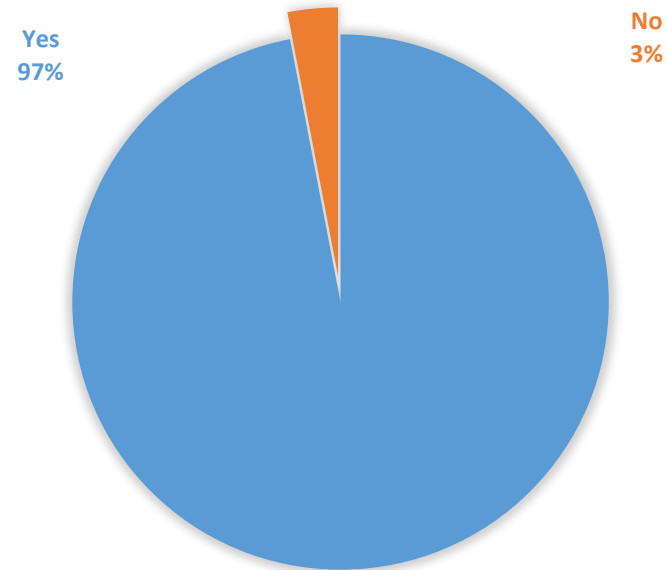
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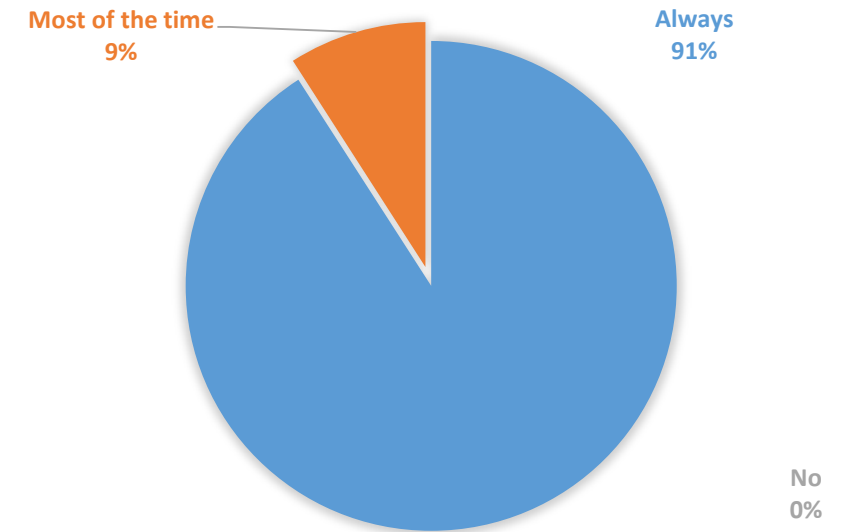


SURVEY RESULTS

5. DO WE CARE ABOUT YOUR NEEDS?

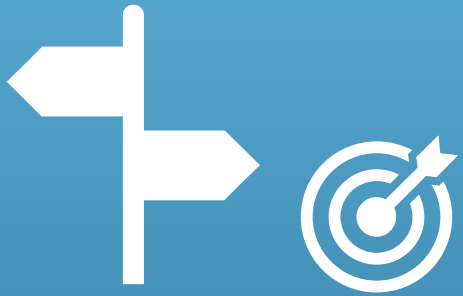


6. CAN YOU TRUST US TO LOOK AFTER YOUR BEST INTERESTS?



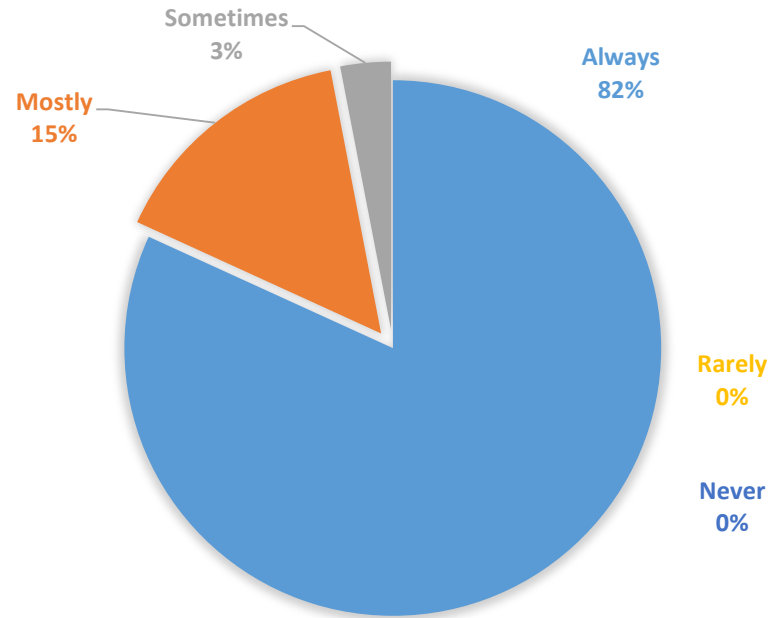
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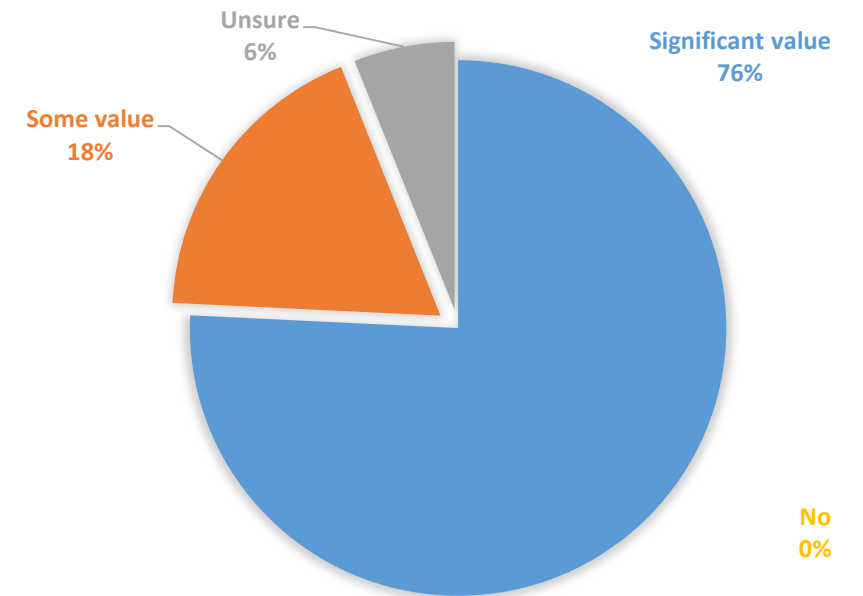


SURVEY RESULTS

7. DO WE DELIVER ON OUR PROMISES?

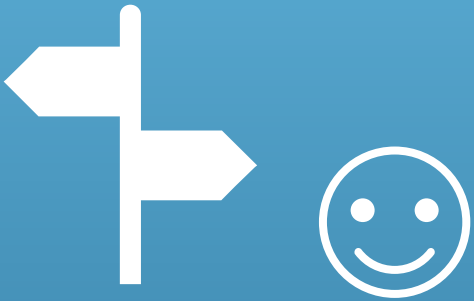


8. DO YOU GET VALUE FROM OUR SERVICE?



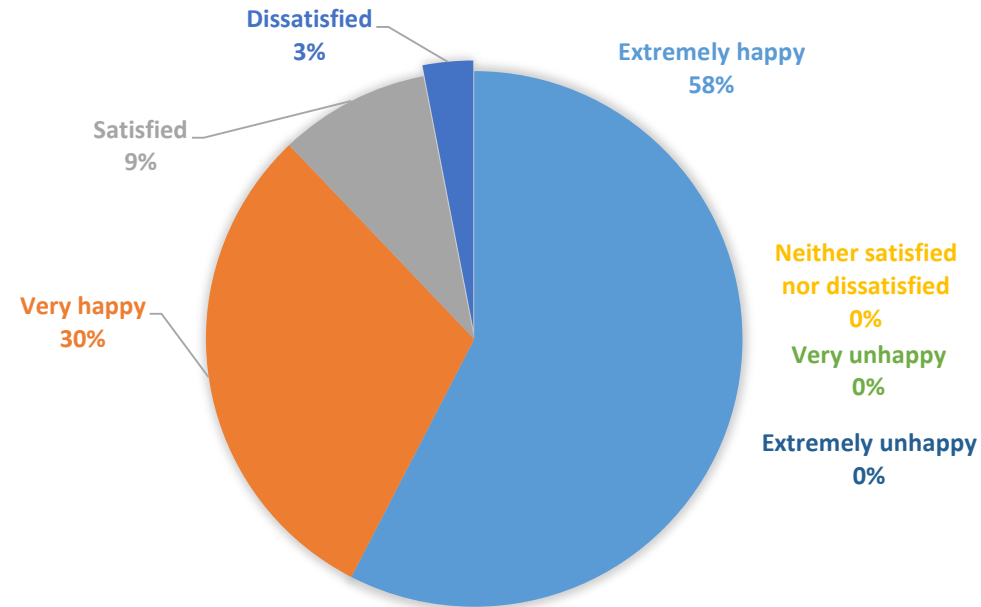
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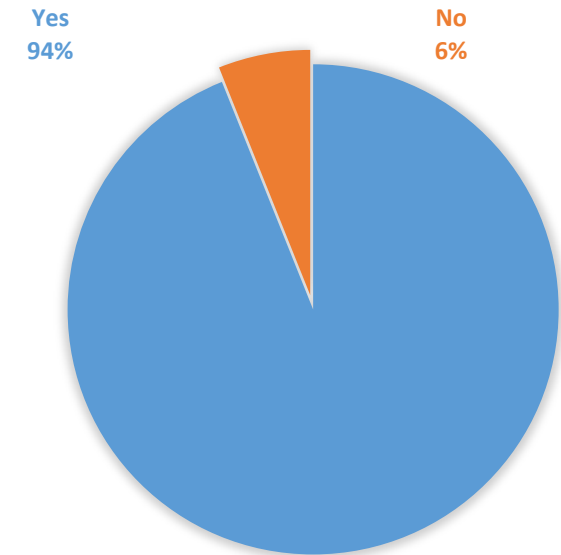


SURVEY RESULTS

9. HOW SATISFIED ARE YOU WITH OUR SERVICE?

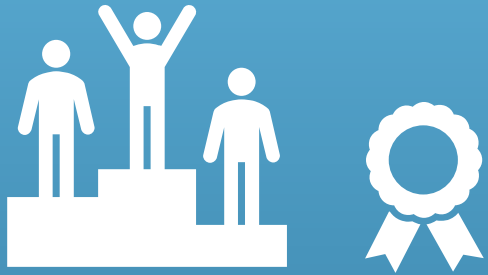


10. WOULD YOU RECOMMEND OUR SERVICE TO A FRIEND?



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WHAT DO WE DO BEST?

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

"Excellent communication"

"Explanations when required"

"Respond to queries promptly"

"Very supportive. I feel confident in the quality of advice given"

"Very clear and respond clearly"

"You answer all of my questions clearly"

"You tailor everything to our financial needs and give us a truly personal service"

"You give help and advice when required, no matter how small"

"We get a personal service"

"Very approachable, knowledgeable and friendly. You are always responsive to any questions"



HOW ARE WE DIFFERENT?

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

"You so clearly value your clients with a reassuring flow of communication backed up by very robust and well-considered advice"

"I don't feel that my questions are irrelevant"

"You tailor advice to our needs – not all firms do that"

"You are a small, dedicated team, which is the right size to give us personal attention"

"You give sound advice delivered in a personal way"

"You give easy access to direct advice"

"You are more transparent than other firms"

"You are professional but also very supportive on a personal level"

"You give the personal touch"

"You communicate and inform – we get a personal service"



WHY DID YOU CHOOSE US?

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

"I didn't want a corporate adviser – what do you do when that person leaves to join another firm later on?"

"You were recommended by my solicitor who also uses your services"

"You were recommended to us"

"I chose you because of the customer service"

"I interviewed 3 other firms before choosing you – I did not feel that the others were as open in the initial discussion. I had a better feeling about your organisation than the others"

"You were able to clarify issues for me that I don't understand"

"We received a recommendation to use you"

"We met networking years ago – one of the best decisions I made"



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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