**Customer Perception Survey**

**Financial Planner**

Were you able to achieve your savings goal?

Yes – no

How do you feel your journey to receiving that goal went?

Not good – good – very good – excellent

Do you feel this helped you learn more about saving money?

Was using the financial plan effective?

Did you like the Goal Savings Sheet?

Would you use our financial plan again for a new saving goal?

Do you see value in not being able to access the money freely?

**Loan Service**

Has your income changed since you started with our service?

If yes, what is your new income?

What is the amount of the loan/s that you took out?

What did you spend this loan on?

Were you able to keep up with the repayments?

Did you fully pay off the loan?

Would you take out another loan through our service?

Would you recommend this service to a friend?