In order to help us improve our services we would be grateful if you could tell us a little bit more about yourself and your experience of The Pension Advisory Service. Any information you give us will be kept in the strictest confidence.

If you wish to complete this survey online, please visit
https://www.surveymonkey.com/s/TPASC Customers

Are you:
☐ Female
☐ Male
☐ Other gender definition
☐ Prefer not to say

Are you aged:
☐ 16-19
☐ 20-24
☐ 25-34
☐ 35-44
☐ 45-54
☐ 55-64
☐ 65-74
☐ 75+
☐ Prefer not to say

To which one of these groups do you consider you belong:
☐ White (British, Irish, Any other White background)
☐ Mixed (White and Black Caribbean, White and Black African, White and Asian, other mixed background)
☐ Asian or Asian British (Indian, Bangladeshi, Pakistani, any other Asian background)
☐ Black or Black British (Caribbean, African, any other Black background)
☐ Chinese or other ethnic group
☐ Prefer not to say

Do you consider yourself disabled?
☐ Yes
☐ No
☐ Prefer not to say

What is your current employment status?
☐ Retired
☐ Student
☐ Prefer not to say
☐ Employed (Full-time)
☐ Unemployed
☐ Employed (Part-time/casual)
☐ Employed (Self-employed)

Which of these best describes your job?
(If you are retired, which of these best describes your last job before retirement?)
☐ Managerial
☐ Professional, Technical or Legal
☐ Administrative or Secretarial
☐ Sales or Customer Service
☐ Skilled Trade
☐ Unemployed/NA
☐ Prefer not to say
☐ Other (please specify): _______________________________________________

Which income bracket best describes your situation?
☐ Less than £7,000
☐ £7,000 - £32,500
☐ £32,500 - £45,000
☐ £45,000 - £60,000
☐ £60,000+
☐ Prefer not to say

Are you in receipt of any state benefits? E.g. a State Pension or Jobseeker’s Allowance?
☐ Yes
☐ No
☐ Prefer not to say
How did you originally hear about TPAS?

☐ Attended a TPAS presentation
☐ Citizen’s Advice Bureau
☐ Employer
☐ Financial Ombudsman Service
☐ Financial Services Authority
☐ Internet search
☐ Money Advice Service
☐ Newspaper
☐ Other (please specify): _________________________________________
☐ Pension scheme
☐ Pension Service/DWP
☐ Pensions Ombudsman
☐ Pensions publication/magazine
☐ Pensions Regulator
☐ Radio/TV
☐ Word of mouth

If you have a case number, please write it here. _______________________________________

How satisfied are you with the service The Pensions Advisory Service Helpline provides?

☐ Very satisfied
☐ Satisfied
☐ Neither satisfied nor dissatisfied
☐ Not very satisfied
☐ Very dissatisfied

How satisfied are you that your adviser had sufficient knowledge to answer your query?

☐ Very satisfied
☐ Satisfied
☐ Neither satisfied nor dissatisfied
☐ Not very satisfied
☐ Very dissatisfied

Were your expectations met?

☐ Yes ☐ Partly ☐ No

If you received any guidance from the Helpline, did you act on that guidance?

☐ I did not receive any guidance
☐ I received guidance, but did not act on it
☐ Yes, I received guidance and I acted on it (please give details below)

__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
If a friend or colleague had a pensions query, how likely would you be to refer them to The Pensions Advisory Service?

- Very likely
- Likely
- Not sure
- Unlikely
- Very unlikely

Do you have any other comments to make or suggestions for improvements to the Helpline service? If you run out of space to comment please continue overleaf.

__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________

If you would like to discuss your experience of TPAS services or feed into how we develop our service for the future, please leave your contact details below.

Contact details are needed ONLY if you are happy for us to contact you. Information you give us is treated as strictly private and confidential.

Name: ____________________________  Tel: ____________________________

Email: _________________________________________________________

Thank you for your feedback.

Please post this form back to us in the pre-paid envelope provided.