

REDEMPTION – EXIT INTERVIEW



Dear Client,

Your Opinion is important to us. May we invite you for a few minutes to accomplish our Exit Interview Form.

Please provide all the necessary information and answer all the questions. All information provided herein will be kept confidential. Thank you.

Account Name: _____	Fund: _____
Account Number: _____	Date: _____

Please rate the following:				
	Excellent	Good	Fair	Poor
Fund Performance	1	2	3	4
Website (www.atram.com.ph)	1	2	3	4
Investor relations/services (customer service)	1	2	3	4
ATRAM Account officer/ Direct Sales Advisor	1	2	3	4
Please identify reason/s for redeeming your shares:				
<input type="checkbox"/> Emergency <input type="checkbox"/> Education <input type="checkbox"/> Not satisfied with the returns of my investment <input type="checkbox"/> Medical <input type="checkbox"/> Business <input type="checkbox"/> Others, please specify _____				
How do you feel about the returns?	Satisfied	<input type="checkbox"/>	Not satisfied	<input type="checkbox"/>
If satisfied, would you recommend our funds to your relatives, colleagues and friends?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
If not satisfied, what areas for improvement do you think the company and the Fund Managers need in managing the Fund?				
If we implement the above suggestions, would you reinvest again in the future?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Additional comments and suggestions:				

Signature: _____	Signature: _____
Printed Name: _____	Relationship Manager: _____
Date _____	Date _____