

# CUSTOMER SATISFACTION SURVEY FORM FOR MUTUAL FUND CLIENTS

Please fill the form in CAPITAL LETTERS with BLACK ink only



## Thank you for choosing AU Bank to invest in Mutual Funds:

Name of the customer:	P	R	E	F	I	X	F	I	R	S	T	M	I	D	D	L	E	L	A	S	T	N	A	M	E
AU Bank																									
Branch:																									
*Mobile No +91																									

### 1. What do you consider the most important parameters while investing?

- A. Returns
- B. Lower Risk Factor
- C. Credit Rating
- D. Inflation
- E. Company
- F. Lock in Period

### 2. You have invested for long term or short term in ..... Mutual Fund ?

- A. Long Term
- B. Short Term

### 3. Which type of schemes do you prefer to invest ?

- A. a. Close Ended
- B. Open Ended

### 4. What type of scheme have you invested in?

- A. Equity fund
- B. Hybrid fund (equity & Debt combination)
- C. Debt fund
- D. Liquid funds
- E. ELSS Funds

### 5. What type of investment have you done through AU Bank?

- A. SIP
- B. Lumpsum
- C. STP

### 6. What is the tenure of your current investment that you have done through AU Bank?

- A. Less than 1 year
- B. 1 year to 3 years
- C. 3 years to 5 years
- D. More than 5 years

### 7. Have you received your investment statement?

- A. Yes, through Physical letter
- B. Yes, through E-mail
- C. Yes, through AU bank MF operations team
- D. NO

### 8. How do you access your mutual fund portfolio through AU Bank?

- A. Through AU Branch
- B. Through MF Registrar
- C. Through Asset Management Company
- D. Through AU Bank website/InstaMF portal

### 9. Rate your overall experience of investing in MF with AU (5\* - Best, 4\* - Average anything below 2\* is Bad)

- A. 5\*\*\*\*\*
- B. 4\*\*\*\*
- C. 3\*\*\*
- D. 2\*\*
- E. 1\*

Note: Please download the form and submit at your nearest branch with Customer Service Desk