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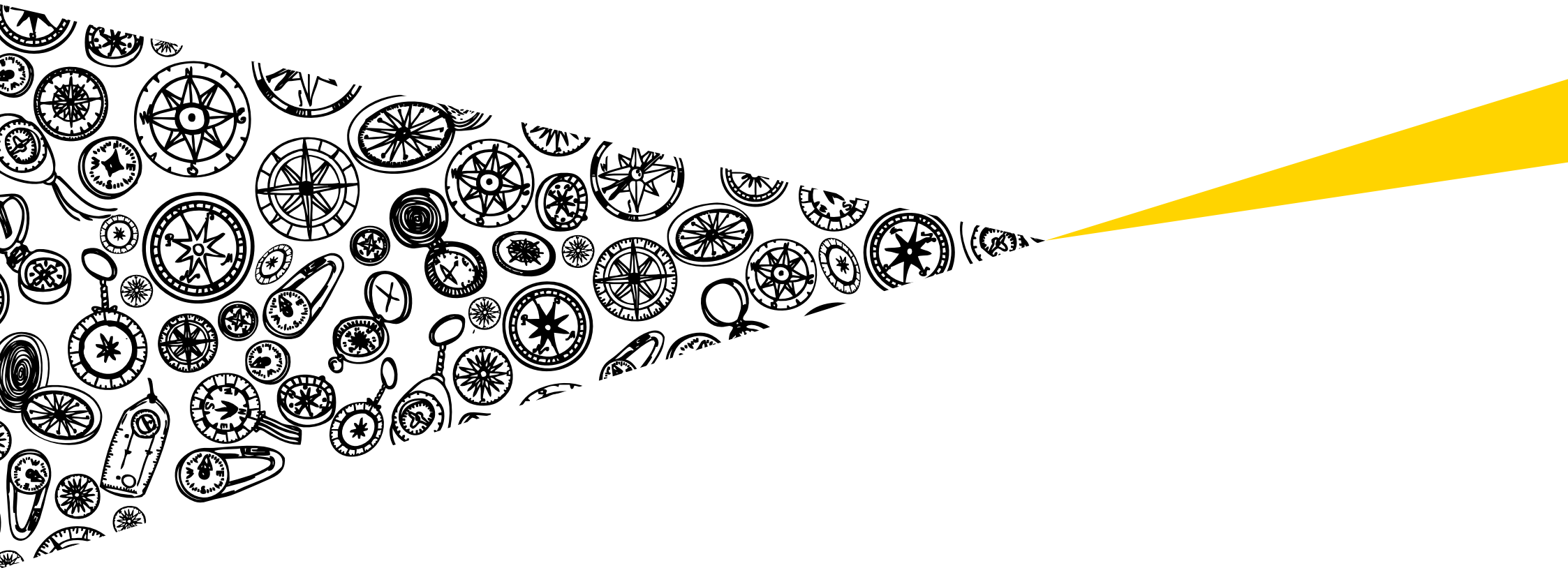
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Funds in Court

2012 Client Survey





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Executive Summary

We have completed the survey of clients in a manner agreed with you in our engagement letter. The results of the survey are presented in this report on page 3-18.

We issued 1,000 surveys and received 179 responses. The percentage of surveys returned has decreased from 23% in 2006 and 2009 to 18% in 2012. Respondents were asked to rate the level of satisfaction from 1-7 (7 being the most positive) or 8 which indicated that the question was not applicable or the respondent was unsure. We would consider a response of 5 or greater to be positive, whilst a response of 3 or below signifies dissatisfaction.

The results of the 2012 client survey have generally been positive, with 18 of the 20 questions showing an average rating of 5.1 or greater. Key results from the survey include:

- ▶ Question 13: 'Do you find the Senior Master's Office hours of operation, as described in the introductory booklet, meet your needs' that received an average score of 5.81 in 2012, which was the highest overall average.
- ▶ Of the services at the Senior Master's Office, the Client Liaison Section had the highest median score of 7, whilst the legal section had the lowest at 4.

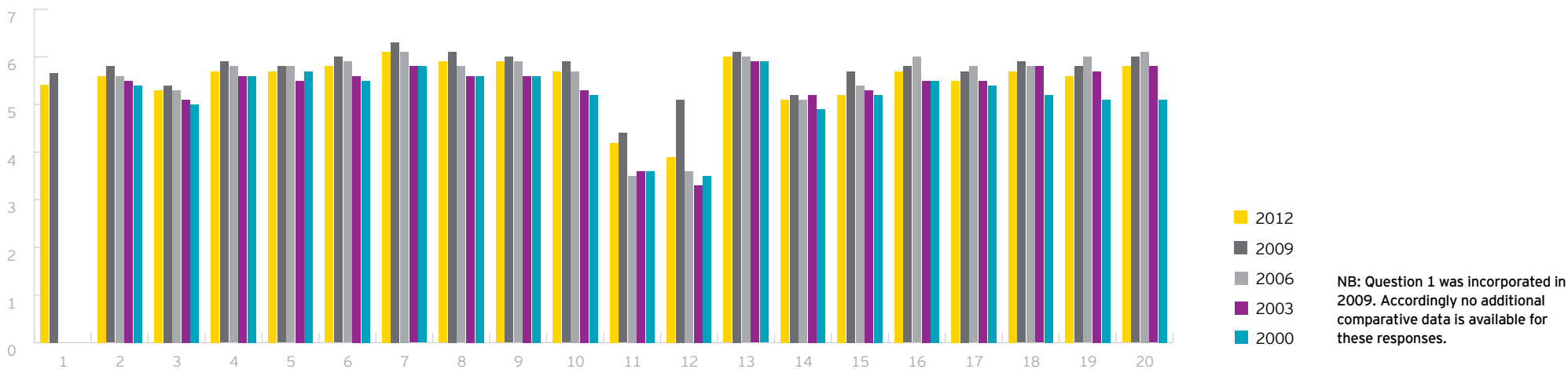
In a comparison with the 2009 survey, the following movements were observed:

- ▶ Responses across all of the questions demonstrated a lower level of satisfaction compared with the prior survey. The movement in responses ranged from 0.1 to 0.2, excluding Question 12 and 15;
- ▶ Responses for Questions 12 'If you made a complaint, were you satisfied with how it was dealt with' decreased from 5.1 to 3.87
- ▶ Responses for Questions 15 'Are you satisfied with the investment returns received on your funds held in Court' decreased from 5.7 to 5.2.

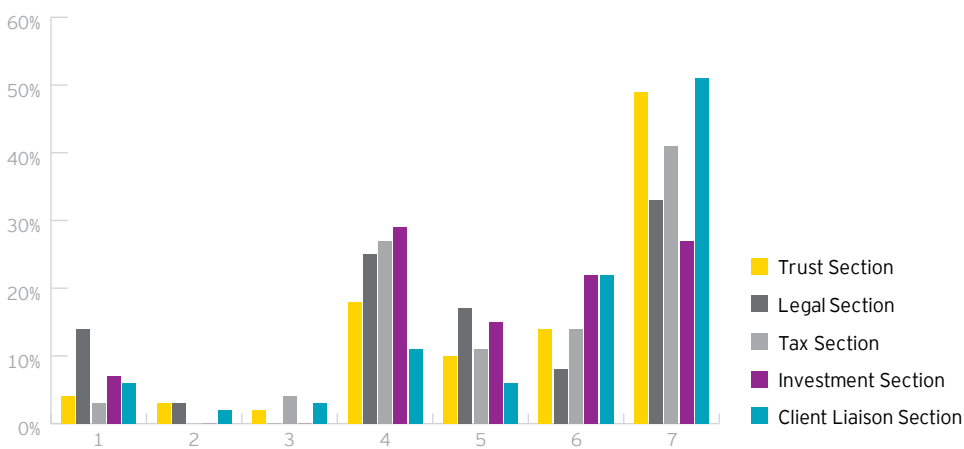
We have also listed additional comments (Appendix 6) which were provided by the respondents. As stated in the questionnaire, all names of respondents and Trust Officers have been removed to ensure anonymity.

Appendix 1 – Detailed Response by Question – Graphical

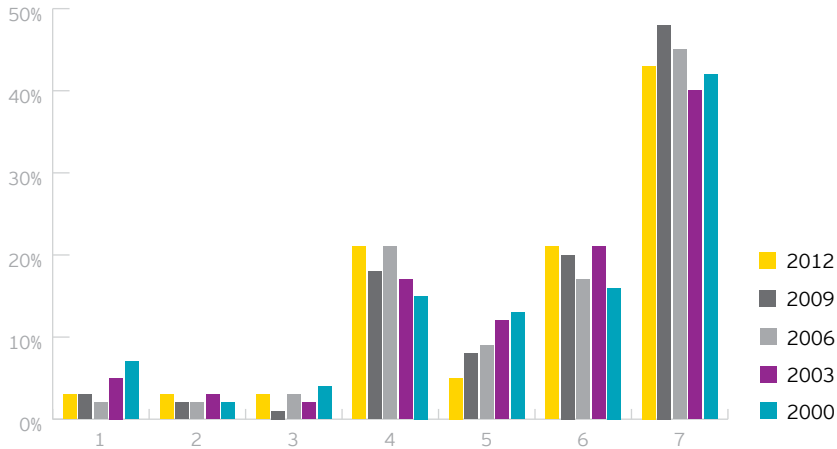
Summary of Average Responses



Question 1
Have you had any dealings with the following services, and how do you rate their service?

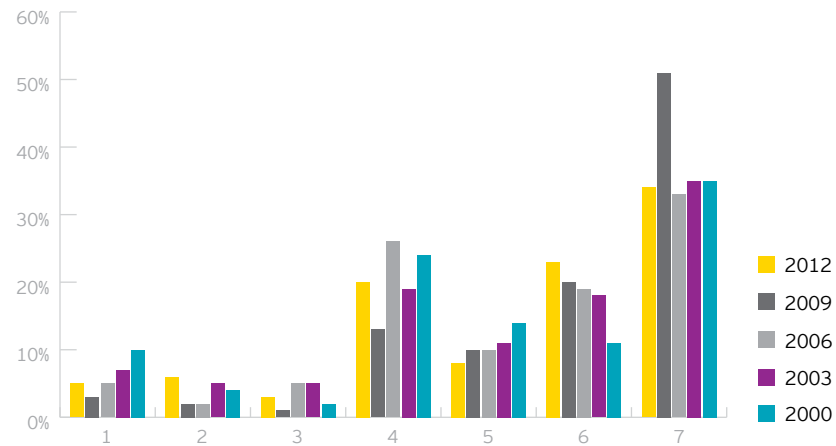


Question 2
How do you view the accessibility of staff and services?



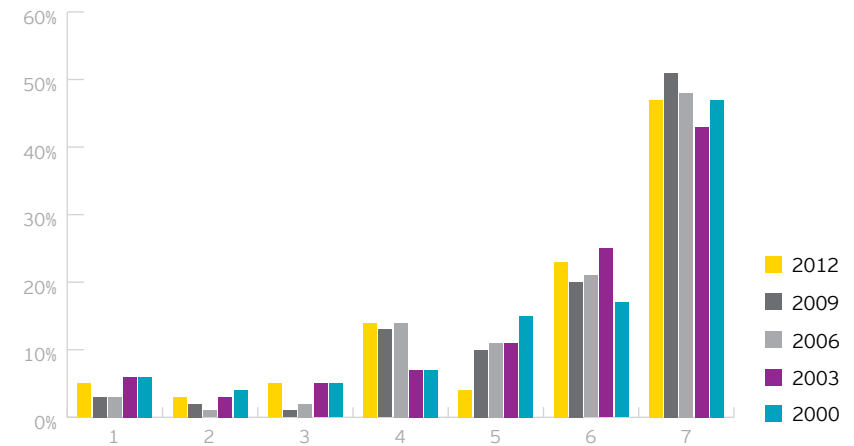
Question 3

How do you view the range of services offered to you?



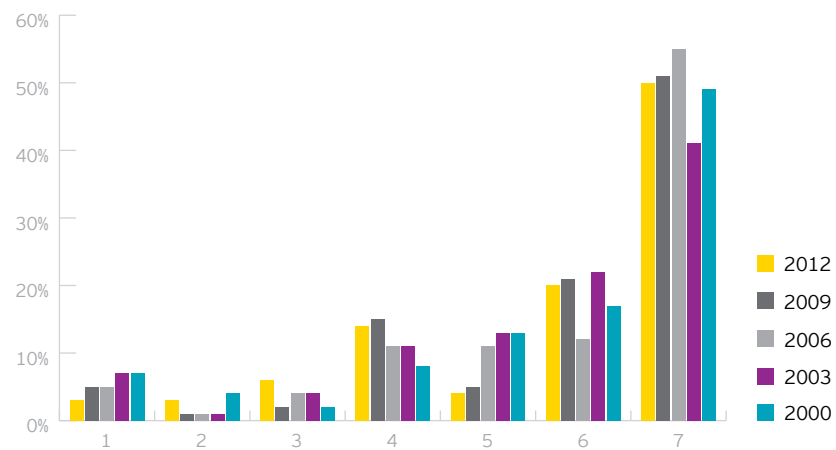
Question 4

How do you view the standards and professionalism that you have received?



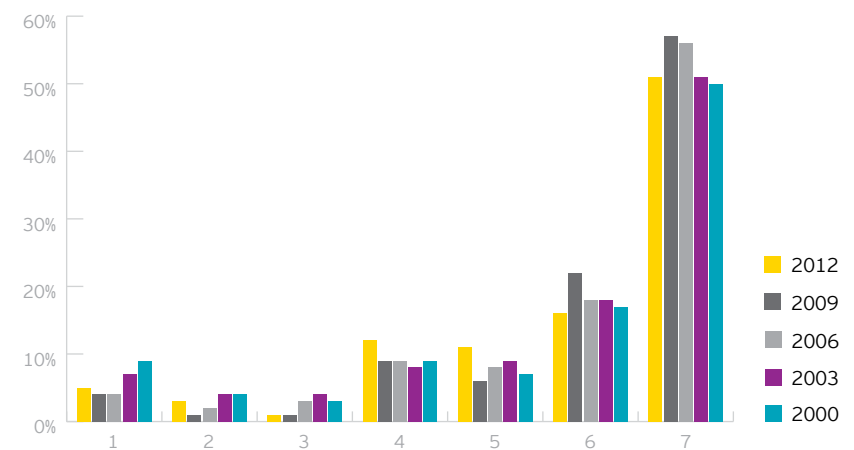
Question 5

How would you assess the overall relationship between you and the staff?

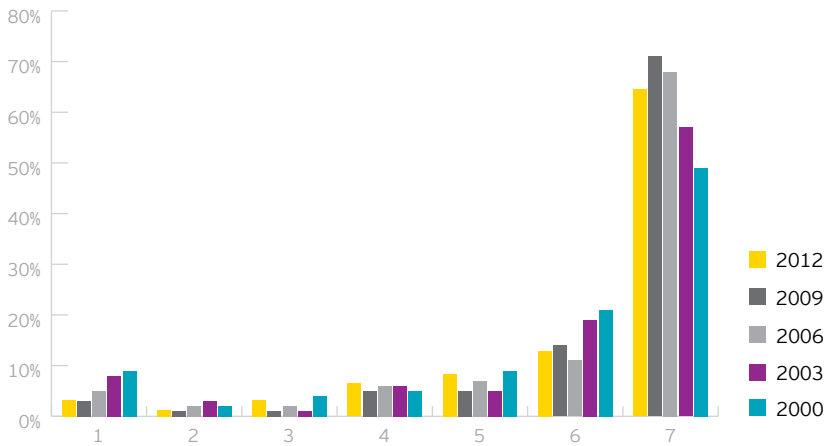


Question 6

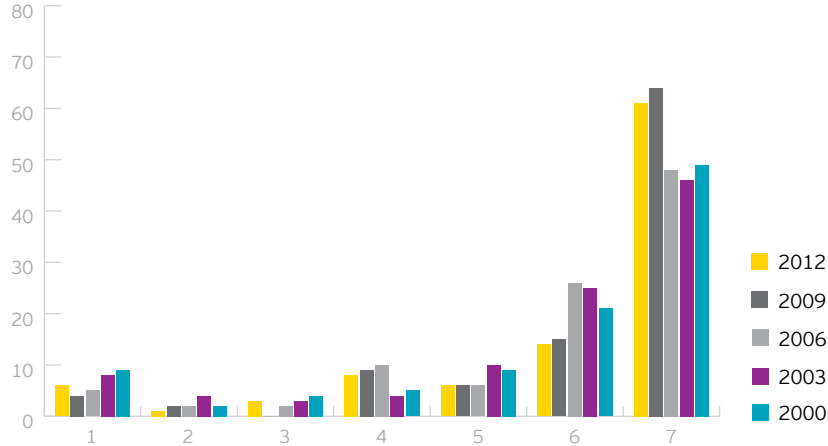
Do you feel satisfied with the service you received?



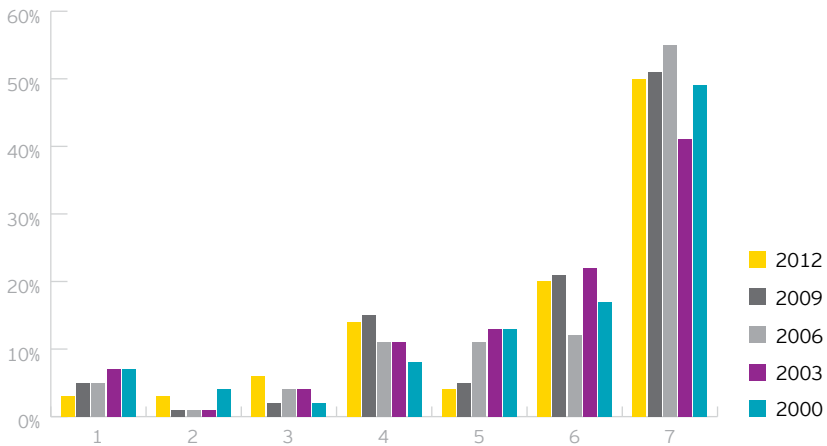
Question 7
Were you treated with dignity and respect?



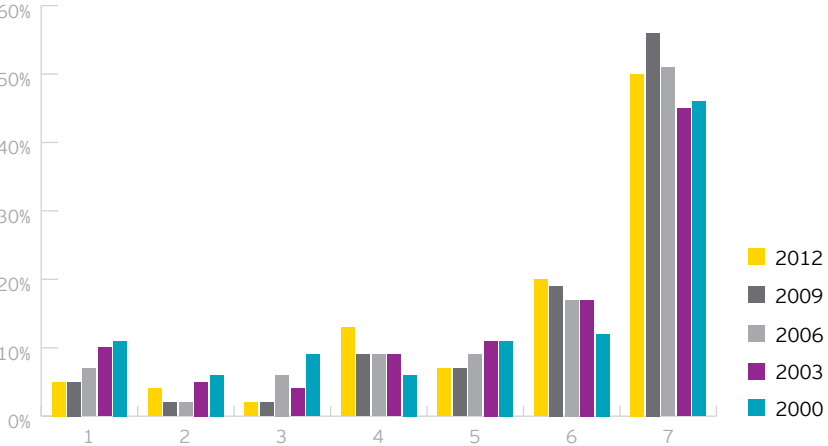
Question 8
Were your needs and wishes listened to in a sensitive manner?



Question 9
Did the service meet your expectations?

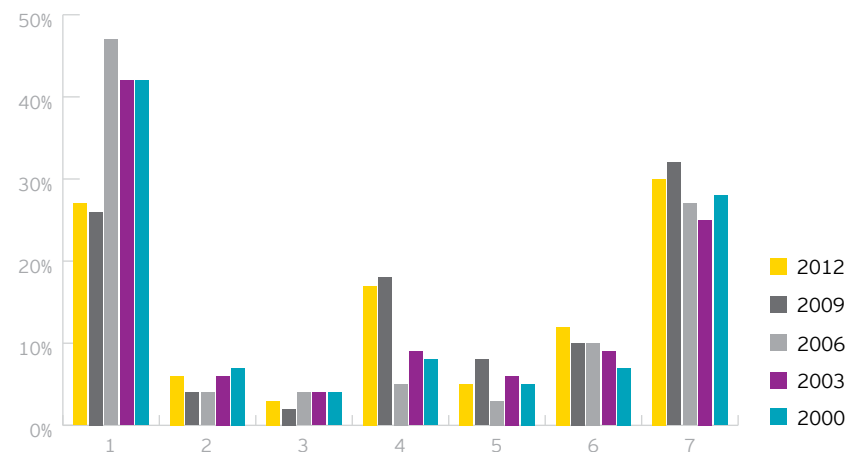


Question 10
Do you believe you were given enough information?



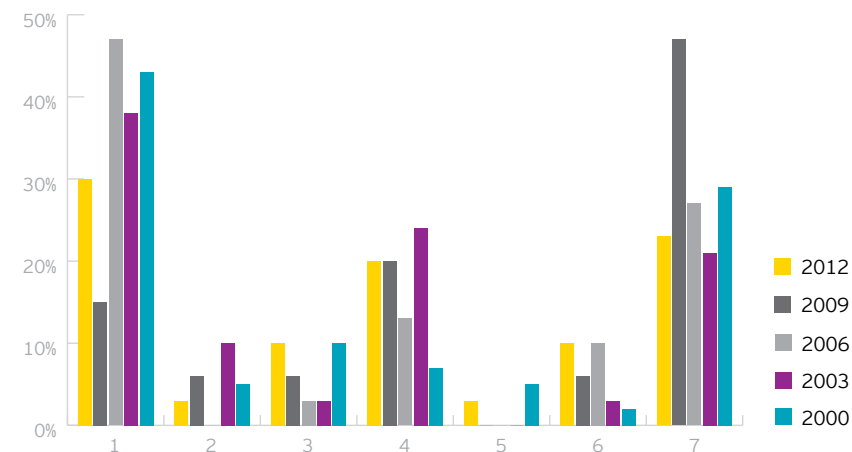
Question 11

Do you know how to make a complaint about the service?



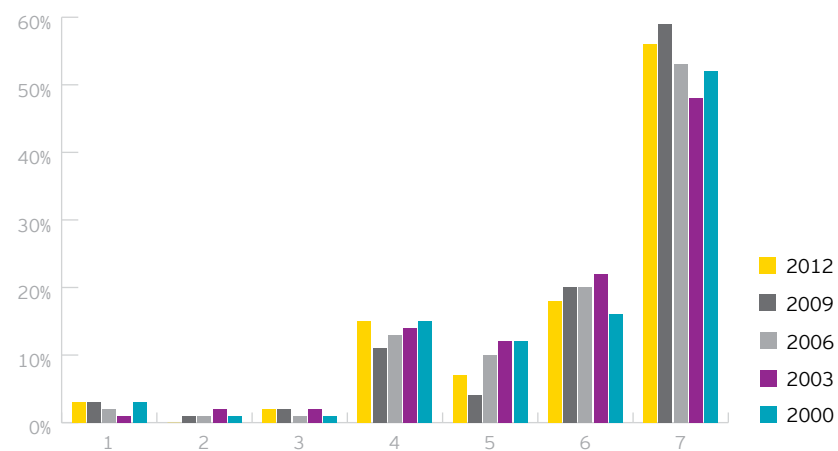
Question 12

If you have made a complaint, were you satisfied with how it was dealt with?



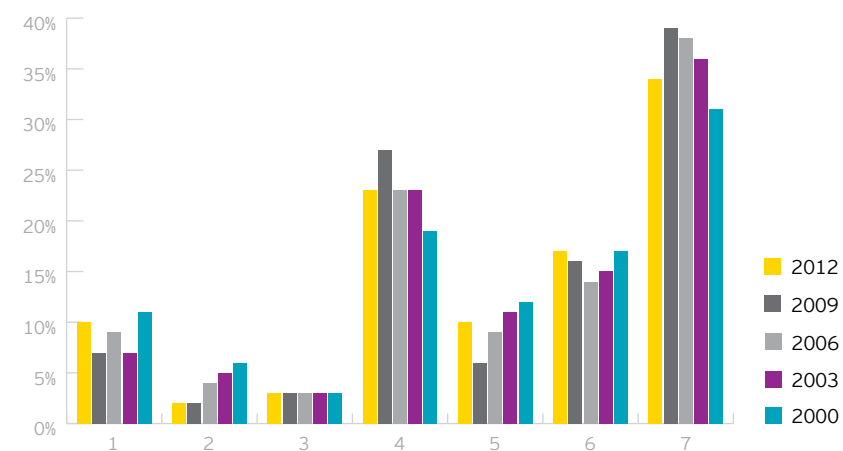
Question 13

Do you find the Senior Master's Office hours of operation, as described in the introductory booklet, meet your needs?



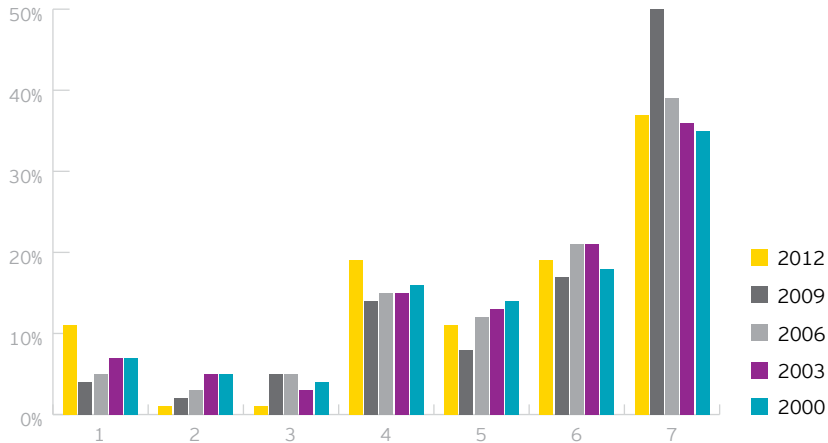
Question 14

Do you understand the manner in which your funds are invested by the Senior Master's Office?



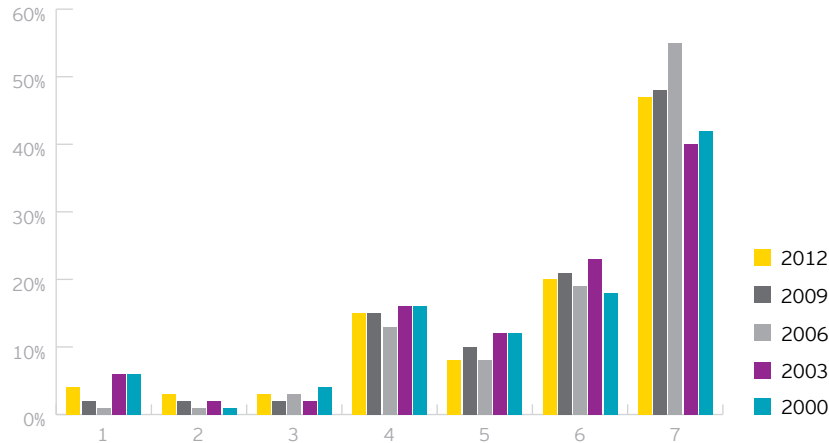
Question 15

Are you satisfied with the investment returns received on your funds held in Court?



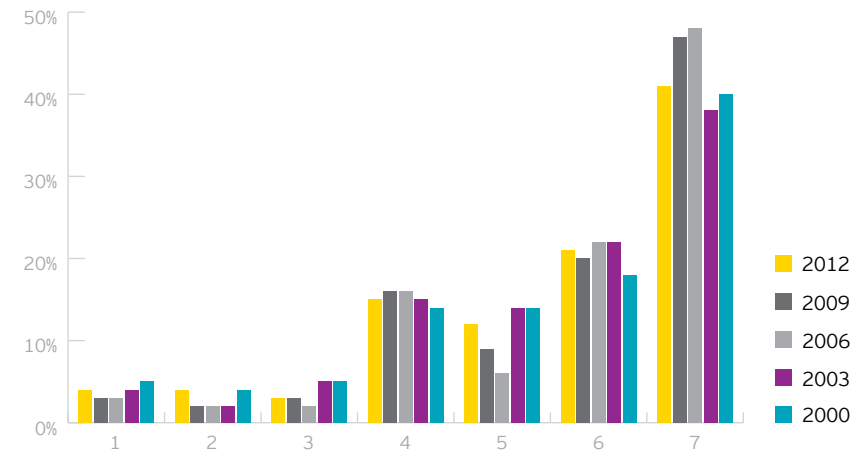
Question 16

Does the bi-annual statement of beneficiary's account meet your needs?



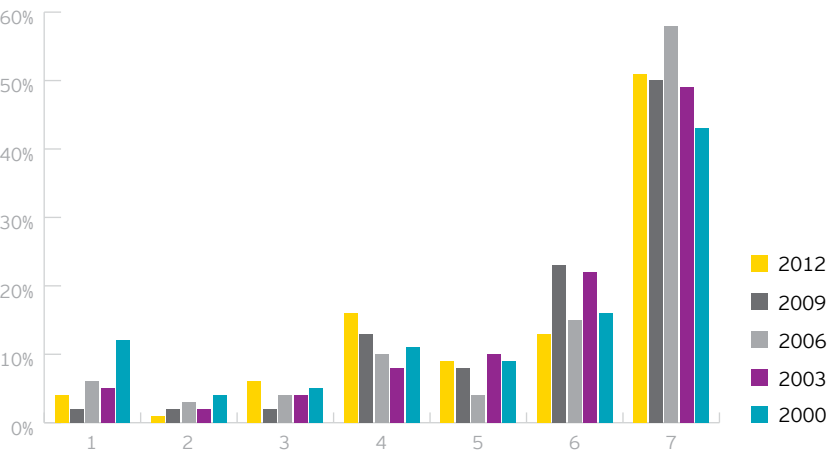
Question 17

Is the information disclosed in the bi-annual statement explained clearly?



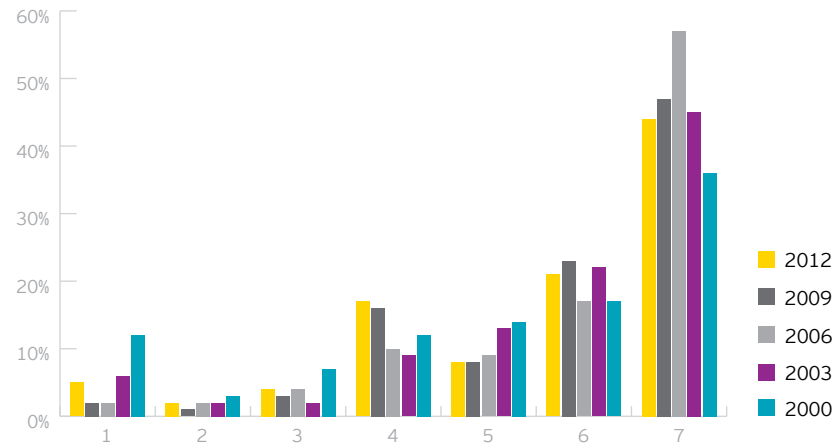
Question 18

Is the taxation statement provided by the Senior Master's office in September received on a timely basis?



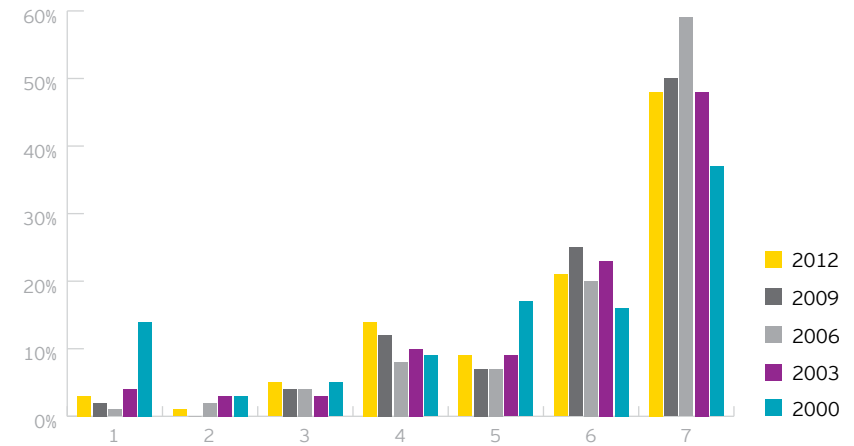
Question 19

Is the taxation statement clear?



Question 20

Does the taxation statement contain all necessary information?



Appendix 2 – Detailed Response by Question – Numerical

Question		Response Value							Average	Median	# Responses	Not Completed	Total Responses
		1	2	3	4	5	6	7					
Question 1 – Have you had any dealings with the following services, and how would you rate their service?													
Trust Section	2012	4%	3%	2%	18%	10%	14%	49%	5.7	6	100	79	179
Legal Section	2012	14%	3%	0%	25%	17%	8%	33%	4.9	5	36	143	179
Tax Section	2012	3%	0%	4%	27%	11%	14%	41%	5.5	6	71	108	179
Investment Section	2012	7%	0%	0%	29%	15%	22%	27%	5.2	5	41	138	179
Client Liaison Section	2012	6%	2%	3%	11%	6%	22%	51%	5.8	7	104	75	179
Total									5.42	5.8			
Prior Survey Response													
Trust Section	2009	6%	0%	2%	18%	10%	18%	46%	5.8	6.5	128	105	233
Legal Section	2009	12%	1%	0%	12%	12%	20%	43%	5.5	7	51	182	233
Tax Section	2009	5%	3%	1%	16%	9%	25%	41%	5.6	6	88	145	233
Investment Section	2009	11%	2%	4%	13%	7%	18%	45%	5.4	6	55	178	233
Client Liaison Section	2009	4%	1%	2%	9%	9%	18%	57%	6	7	141	92	233
Total									5.66	6.5			
Question 2 – How do you view the accessibility of staff and services?													
	2012	3%	3%	3%	21%	5%	21%	43%	5.6	6	152	27	179
	2009	3%	2%	1%	18%	8%	20%	48%	5.8	6	214	19	233
	2006	2%	2%	3%	21%	9%	17%	45%	5.6	6	309	62	371
	2003	5%	3%	2%	17%	12%	21%	40%	5.5	6	188	4	192
	2000	7%	2%	4%	15%	13%	16%	42%	5.4	6	217	3	220
Question 3 – How do you view the range of services offered to you?													
	2012	5%	6%	3%	20%	8%	23%	34%	5.3	6	143	36	179
	2009	3%	2%	1%	13%	10%	20%	51%	5.4	6	216	17	233
	2006	5%	2%	5%	26%	10%	19%	33%	5.3	6	301	70	371
	2003	7%	5%	5%	19%	11%	18%	35%	5.1	6	185	7	192
	2000	10%	4%	2%	24%	14%	11%	35%	5	5	215	5	220

Question	Response Value							Average	Median	# Responses	Not Completed	Total Responses	
	1	2	3	4	5	6	7						
Question 4 – How do you view the standards and professionalism of service that you received?													
	2012	5%	3%	5%	14%	4%	23%	47%	5.7	6	152	27	179
	2009	3%	2%	1%	13%	10%	20%	51%	5.9	7	216	17	233
	2006	3%	1%	2%	14%	11%	21%	48%	5.8	6	328	43	371
	2003	6%	3%	5%	7%	11%	25%	43%	5.6	6	187	5	192
	2000	6%	4%	5%	7%	15%	17%	47%	5.6	6	216	4	220
Question 5 – How would you assess the overall relationship between you and the staff?													
	2012	3%	3%	6%	14%	4%	20%	50%	5.7	6	149	30	179
	2009	5%	1%	2%	15%	5%	21%	51%	5.8	7	215	18	233
	2006	5%	1%	4%	11%	11%	12%	55%	5.8	7	292	79	371
	2003	7%	1%	4%	11%	13%	22%	41%	5.5	6	186	6	192
	2000	7%	4%	2%	8%	13%	17%	49%	5.7	6	215	5	220
Question 6 – Do you feel satisfied with the service you received?													
	2012	5%	3%	1%	12%	11%	16%	51%	5.8	7	160	19	179
	2009	4%	1%	1%	9%	6%	22%	57%	6	7	220	13	233
	2006	4%	2%	3%	9%	8%	18%	56%	5.9	7	325	46	371
	2003	7%	4%	4%	8%	9%	18%	51%	5.6	7	187	5	192
	2000	9%	4%	3%	9%	7%	17%	50%	5.5	6.5	218	2	220
Question 7 – Were you treated with dignity and respect?													
	2012	3%	1%	3%	6%	8%	13%	65%	6.1	7	155	24	179
	2009	3%	1%	1%	5%	5%	14%	71%	6.3	7	218	15	233
	2006	5%	2%	2%	6%	7%	11%	68%	6.1	7	311	60	371
	2003	8%	3%	1%	6%	5%	19%	57%	5.8	7	187	5	192
	2000	9%	2%	4%	5%	9%	21%	49%	5.8	7	214	6	220

Question	Response Value								Average	Median	# Responses	Not Completed	Total Responses
		1	2	3	4	5	6	7					
Question 8 – Were your needs and wishes listened to in a sensitive manner?													
	2012	6%	1%	3%	8%	6%	14%	61%	5.9	7	154	25	179
	2009	4%	2%	0%	9%	6%	15%	64%	6.1	7	213	20	233
	2006	5%	2%	2%	10%	6%	26%	48%	5.8	6	299	72	371
	2003	8%	4%	3%	4%	10%	25%	46%	5.6	6	186	6	192
	2000	9%	2%	4%	5%	9%	21%	49%	5.6	6	214	6	220
Question 9 – Did the service meet your expectations?													
	2012	3%	2%	1%	11%	10%	19%	53%	5.9	7	159	20	179
	2009	5%	1%	0%	11%	6%	21%	56%	6	7	219	14	233
	2006	5%	1%	4%	9%	8%	19%	54%	5.9	7	317	54	317
	2003	8%	3%	5%	5%	9%	22%	48%	5.6	6	185	7	192
	2000	10%	2%	1%	10%	12%	16%	49%	5.6	6	216	4	220
Question 10 – Do you believe you were given enough information?													
	2012	5%	4%	2%	13%	7%	20%	50%	5.7	6	157	22	179
	2009	5%	2%	2%	9%	7%	19%	56%	5.9	7	218	15	233
	2006	7%	2%	6%	9%	9%	17%	51%	5.7	7	332	39	317
	2003	10%	5%	4%	9%	11%	17%	45%	5.3	6	186	6	192
	2000	11%	6%	9%	6%	11%	12%	46%	5.2	6	216	4	220
Question 11 – Do you know how to make a complaint about the service?													
	2012	27%	6%	3%	17%	5%	12%	30%	4.2	4	144	35	179
	2009	26%	4%	2%	18%	8%	10%	32%	4.4	5	193	40	233
	2006	47%	4%	4%	5%	3%	10%	27%	3.5	2	314	57	317
	2003	42%	6%	4%	9%	6%	9%	25%	3.6	3	183	9	192
	2000	42%	7%	4%	8%	5%	7%	28%	3.6	3	215	5	220

Question	Response Value							Average	Median	# Responses	Not Completed	Total Responses	
	1	2	3	4	5	6	7						
Question 12 – If you have made a complaint, were you satisfied with how it was dealt with?													
	2012	30%	3%	10%	20%	3%	10%	23%	3.9	4	30	149	179
	2009	15%	6%	6%	20%	0%	6%	47%	5.1	7	34	199	233
	2006	47%	0%	3%	13%	0%	10%	27%	3.6	3.5	30	341	371
	2003	38%	10%	3%	24%	0%	3%	21%	3.3	3	29	163	192
	2000	43%	5%	10%	7%	5%	2%	29%	3.5	3	42	178	220
Question 13 – If you have made a complaint, were you satisfied with how it was dealt with?													
	2012	3%	0%	2%	15%	7%	18%	56%	6.0	7	153	26	179
	2009	3%	1%	2%	11%	4%	20%	59%	6.1	7	214	19	233
	2006	2%	1%	1%	13%	10%	20%	53%	6	7	301	70	371
	2003	1%	2%	2%	14%	12%	22%	48%	5.9	6	185	7	192
	2000	3%	1%	1%	15%	12%	16%	52%	5.9	7	212	8	220
Question 14 – Do you understand the manner in which your funds are invested by the Senior Master's Office?													
	2012	10%	2%	3%	23%	10%	17%	34%	5.1	6	162	17	179
	2009	7%	2%	3%	27%	6%	16%	39%	5.2	6	217	16	233
	2006	9%	4%	3%	23%	9%	14%	38%	5.1	6	360	11	371
	2003	7%	5%	3%	23%	11%	15%	36%	5.2	6	188	4	192
	2000	11%	6%	3%	19%	12%	17%	31%	4.9	5	218	2	220
Question 15 – Are you satisfied with the investment returns received on your funds held in Court?													
	2012	11%	1%	1%	19%	11%	19%	37%	5.2	6	155	24	179
	2009	4%	2%	5%	14%	8%	17%	50%	5.7	7	209	24	233
	2006	5%	3%	5%	15%	12%	21%	39%	5.4	6	345	26	371
	2003	7%	5%	3%	15%	13%	21%	36%	5.3	6	179	13	192
	2000	7%	5%	4%	16%	14%	18%	35%	5.2	6	207	13	220

Question	Response Value								Average	Median	# Responses	Not Completed	Total Responses
	1	2	3	4	5	6	7						
Question 16 – Does the bi-annual statement of beneficiary’s account meet your needs?													
	2012	4%	3%	3%	15%	8%	20%	47%	5.7	6	158	21	179
	2009	2%	2%	2%	15%	10%	21%	48%	5.8	6	220	13	233
	2006	1%	1%	3%	13%	8%	19%	55%	6	7	339	32	371
	2003	6%	2%	2%	16%	12%	23%	40%	5.5	6	179	13	192
	2000	6%	1%	4%	16%	12%	18%	42%	5.5	6	213	7	220
Question 17 – Is the information disclosed in the bi-annual statement explained clearly?													
	2012	4%	4%	3%	15%	12%	21%	41%	5.5	6	160	19	179
	2009	3%	2%	3%	16%	9%	20%	47%	5.7	6	219	14	233
	2006	3%	2%	2%	16%	6%	22%	48%	5.8	6	343	28	371
	2003	4%	2%	5%	15%	14%	22%	38%	5.5	6	180	12	192
	2000	5%	4%	5%	14%	14%	18%	40%	5.4	6	214	6	220
Question 18 – Is the taxation statement provided by the Senior Master's Office received on a timely basis?													
	2012	4%	1%	6%	16%	9%	13%	51%	5.7	7	156	23	179
	2009	2%	2%	2%	13%	8%	23%	50%	5.9	6.5	212	21	233
	2006	6%	3%	4%	10%	4%	15%	58%	5.8	7	330	41	371
	2003	5%	2%	4%	8%	10%	22%	49%	5.8	6	176	16	192
	2000	12%	4%	5%	11%	9%	16%	43%	5.2	6	204	15	220
Question 19 – Is the taxation statement clear?													
	2012	5%	2%	4%	17%	8%	21%	44%	5.60	6	155	24	179
	2009	2%	1%	3%	16%	8%	23%	47%	5.8	6	213	20	233
	2006	2%	2%	4%	10%	9%	17%	57%	6	7	330	41	371
	2003	6%	2%	2%	9%	13%	22%	45%	5.7	6	175	17	192
	2000	12%	3%	7%	12%	14%	17%	36%	5.1	6	200	20	220

Question	Response Value								Average	Median	# Responses	Not Completed	Total Responses
	1	2	3	4	5	6	7						
Question 20 – Does the taxation statement contain all necessary information?													
2012	3%	1%	5%	14%	9%	21%	48%	5.8	6	148	31	179	
2009	2%	0%	4%	12%	7%	25%	50%	6	7	204	29	233	
2006	1%	2%	4%	8%	7%	20%	59%	6.1	7	314	57	371	
2003	4%	3%	3%	10%	9%	23%	48%	5.8	6	174	18	192	
2000	14%	3%	5%	9%	17%	16%	37%	5.1	6	197	23	220	

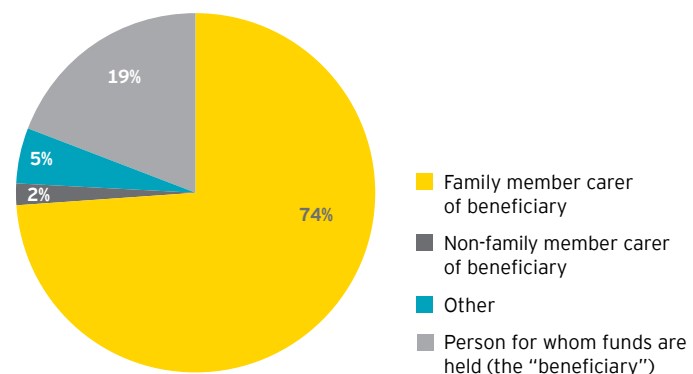
NB: Response numbers may differ between questions as some surveys were returned partially completed, not applicable to the respondent or the respondent was unsure of their answer. Those questions which were completed were included in the results.

Appendix 3 – Average and Median Results by Type of Respondent

	1.1	1.2	1.3	1.4	1.5	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	Sample
Beneficiary – Average	5.1	4.5	4.8	4.1	5.6	5.2	4.9	5.4	5.4	5.4	5.6	5.4	5.4	5.2	4.4	4.0	5.8	4.6	5.4	5.4	4.9	5.4	5.3	5.5	35
Beneficiary – Median	5	5	5	4	6	6	5	6	6	6	6	7	6	6	5	4	7	5	6	6	6	6	6	6	
Family Member Carer – Average	6.8	7.5	7.1	7.5	6.7	6.1	5.9	6.1	6.2	6	6.5	6.3	6.2	6.1	4.8	7.5	6.3	5.3	5.6	6	5.8	6	5.9	6.2	132
Family Member Carer – Median	7	5	6	6	7	6	6	6	6	7	7	7	7	7	4	3	7	6	6	6.5	6	7	6.5	7	
Non-Family Member Carer – Average	IC	IC	7	7	7	6.5	6.5	7	7	7	7	7	7	7	6	IC	6.5	5.5	6.5	7	7	7	6.5	6.5	3
Non-Family Member Carer – Median	IC	IC	7	7	7	6.5	6.5	7	7	7	7	7	7	7	6	IC	6.5	5.5	6.5	7	7	7	6.5	6.5	
Not Completed																									9
Total																									179

IC: Incomplete form returned.

Average responses – type of respondent



% type of respondents

