



# SKYBOUND

WEALTH MANAGEMENT

## Employee's details

|              |  |                        |  |
|--------------|--|------------------------|--|
| Name         |  | Current position       |  |
| Department   |  | Location               |  |
| Line manager |  | Date of exit interview |  |
| Start date   |  | Termination date       |  |

## Job description and duties

What did you like most about your job and why?

What did you like least about your job and why?

Were your duties clearly described to you when you took on the role?

Have your duties changed since you took on the role? If so, how?

Do you have any suggestions as to how the job could be improved? If so, have you raised them in the past with your line manager?

Did you feel valued in your role?

Did you feel that you had an acceptable workload or were you under- or overworked?

How would you describe the prospects for advancement/promotion?

#### **Working conditions**

How would you describe the physical working conditions in your department?

Do you have any suggestions as to how the department working conditions could be improved? If so, have you raised them in the past with your line manager?

#### **Relationships with line manager and colleagues**

How would you describe morale in your department?

How would you describe your working relationship with your colleagues?

How would you describe your working relationship with your line manager?

| <b>Did your line manager:</b>                       | <b>Always</b> | <b>Often</b> | <b>Seldom</b> | <b>Never</b> |
|---|---------------|--------------|---------------|--------------|
| Explain tasks properly?                             |               |              |               |              |
| Give adequate instructions?                         |               |              |               |              |
| Give adequate help/advice where required?           |               |              |               |              |
| Listen to suggestions?                              |               |              |               |              |
| Show fair/unbiased treatment?                       |               |              |               |              |
| Provide constructive feedback on your performance?  |               |              |               |              |
| Give praise where due?                              |               |              |               |              |
| Keep you informed about your progress?              |               |              |               |              |
| Know and follow the procedures of the organisation? |               |              |               |              |

**Pay and benefits provided by the organisation**

| How would you rate the following pay and benefits provided by the organisation? | Very good | Good | Average | Poor | Very poor |
|---|-----------|------|---------|------|-----------|
| Remuneration  |           |      |         |      |           |
| Pension   |           |      |         |      |           |
| Bonus scheme  |           |      |         |      |           |
| Health insurance  |           |      |         |      |           |

**Communication of the organisation**

How did you feel about the level of communication within your team/department?

How did you feel about the level of inter-department communication?

Do you feel that you were kept well informed about what was happening in the organisation as a whole?

Do you have any suggestions as to how communication at the different levels could be improved? If so, have you raised them in the past with your line manager?

**Training and development**

Do you feel that you were given an effective induction into the organisation?

Do you feel that you received adequate training/coaching to perform your role?

What is your opinion of the career development opportunities within the organisation?

Do you feel that the right training was available to you to develop your career within the organisation?

**Work-life balance**

How do you feel about your work-life balance while working for the organisation?

Do you have any suggestions as to how work-life balance within the organisation could be improved?

| How would you rate the following benefits provided by the organisation? | Very good | Good | Average | Poor | Very poor |
|---|-----------|------|---------|------|-----------|
| Maternity pay and leave   |           |      |         |      |           |
| Paternity pay and leave   |           |      |         |      |           |
| Adoption pay and leave  |           |      |         |      |           |
| Shared parental leave   |           |      |         |      |           |
| Childcare   |           |      |         |      |           |

**Other facilities/services of the organisation**

| How would you rate the following aspects of working at the organisation? | Very good | Good | Average | Poor | Very poor |
|--|-----------|------|---------|------|-----------|
| Work equipment   |           |      |         |      |           |
| IT services  |           |      |         |      |           |
| HR services  |           |      |         |      |           |
| Parking facilities   |           |      |         |      |           |
| First aid  |           |      |         |      |           |

**Reputation of the organisation**

Do you think that the organisation has a good reputation as an employer?

Would you recommend the organisation as an employer to others?

**Reason for leaving**

Why are you leaving the organisation?

If you are moving to another job, for which organisation will you be working?

What will your new job involve?

Please use this space for any further comments on your decision to leave the organisation.

**References: General Data Protection Regulation**

Under the General Data Protection Regulation, we require your consent to process personal data (unless one of the other legal requirements apply).

Please indicate below whether or not you wish SWM to provide a reference about your employment with us where a reference request is received from a prospective employer.

In accordance with SWM's policy on giving references, any such reference may include: dates of employment and job title.

Yes/No

You have the right, if you wish, to withdraw consent at any time. If you wish to withdraw your consent, you should do so in writing to our Compliance Department.

Employee's signature:

Date:

HR Signature:

Date:

**Notes**