

Appraisal Form

Employee details			
Name		Current position	
Department		Location	
Line manager		Date of Appraisal	
Start date		Appraiser	
Last Review Date		Qualification Obtained	

Performance Update			
<i>(to be completed by Managers prior to the review meeting, please reach out to SWM HR for assistance on the below info)</i>			
Disciplinary Action		No. of Sick days	
Holidays Used		No. of Late comings	

Current Responsibilities (to be completed by Employee)

State your understanding of your main duties and responsibilities.

Discussion Points

What do you consider to be your most important achievements of the past year?

What actions could be taken to improve your performance in your current position by you, and your Manager?

Feedback for your Line Manager?

Feedback for Skybound Wealth Management?

Please score yourself on the below capability/knowledge in the following areas and quote any evidence if applicable to explain this

Area	Score (10)	Comments <i>(Please provide examples)</i>	Manager's Comments
Time Management			
Productivity			
Teamwork and Leadership			
Professionalism & Work Ethic			
Compliance to the regulatory requirement			
Compliance to the SWM policies			
Energy and Attitude			
Personal Image			
Calmness under pressure			
Adaptability			
Technical Knowledge of Role			

New Personal Objectives and Targets to set over the next 6 months.

Objective/Target	How can we measure this?	How can we achieve this?	When can this be achieved by	Appraiser Comments

Name ways in which your department could improve its processes and as a team?

What types of trainings or experiences would benefit you in the upcoming 6 months? Internally & Externally?

Any other areas to be discussed?

Manager's Remarks?

Signed & Dated by Appraisee

Signed & Dated by Appraiser

.....
Date:

Name:

.....
Date:

Name:

Please access the links to provide your honest feedback and let us know what we are doing great and what we need to improve. It should be noted that we value your opinion, and we would like to work towards making your time at Skybound Wealth Management substantial.

<https://www.glassdoor.com/Reviews/GWM-Reviews-E970107.htm>

<https://www.trustpilot.com/review/gwm-intl.com>

