



# Valued Client Survey

Thank you for choosing our firm to help you meet your financial goals. We want to make sure we're meeting your expectations, so we'd love to hear what you think. This won't take long ... most likely under 5 minutes ... but your thoughts can help us deliver even better service for you.

## Please rate us based on the following statements:

	Always	Usually	Rarely	Never
My phone calls and emails are returned in a timely manner .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If my financial professional is not available, a member of the office staff can give me the information I need .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Regular communications keep me informed about what's happening with my investments .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I have a clear set of financial goals and understand how we are working toward them .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I recommend the firm to family and friends .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

What would you like to discuss in our next meeting? \_\_\_\_\_

How do you describe our firm to other people? \_\_\_\_\_

What makes us stand out from other firms you may have worked with? \_\_\_\_\_

Do you have anyone you'd like to refer? \_\_\_\_\_

**Thank you so much for telling us what you think.  
We appreciate your thoughts and look forward to working with you in the coming year.**

*Brought to you compliments of:*



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