

Sample Client Survey

Thank you for participating in (your company name here) client survey. We appreciate your confidence and want to deliver the highest possible service. Your feedback will help us achieve that goal.

1. How satisfied are you currently with the level of service provided by (firm name)?

- | | | | | |
|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Not at all Satisfied | Slightly Satisfied | Moderately Satisfied | Very Satisfied | Extremely Satisfied |
| <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

2. Are your phone calls answered promptly by the office and returned promptly?

- | | | | | |
|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Rarely | Sometimes | Usually | Mostly | Always |
| <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

3. How satisfied are you with the answers you receive to questions about your account or portfolio?

- | | | | | |
|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Not at Satisfied | Slightly Satisfied | Moderately Satisfied | Very Satisfied | Extremely Satisfied |
| <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

4. How likely are you to recommend us to a friend or member of your family?

- | | | | | |
|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Rarely | Sometimes | Usually | Mostly | Always |
| <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

5. Would you like more communications from (firm Name) and if so what kind? Please check all that apply.

Currently receiving the right amount of communication _____

Want more information about my portfolio and investments _____

Want more general information about the stock and bond markets _____

Want more educational information about finance and investing _____

Want more information about the following topic(s) _____

6. How would you prefer to receive communications from us? Please check all that apply.

Postal mail _____

Email _____

Telephone _____

Internet _____

In person _____

7. How frequently do you visit our website?

Weekly _____

Monthly _____

Infrequently _____

Have never seen website _____

8. Assuming you visited the website, what information would you like to find there? Please check all that apply.

My account information _____

Market updates _____

Information about various investments _____

Educational information _____

Information about the following topics _____

9. What kind of client events would you be interested in attending? Please check all that apply

Breakfast presentation on the markets _____

Luncheon meeting on topics such as retirement planning _____

Social events _____

Other events such as _____

10. Please take a few minutes and tell us what you like about our service, and how we could make it better.

Thank you.