

We greatly value your opinion!

In an effort to continuously enhance our relationships with our clients, we would appreciate your taking the time to complete this Client Relationship Survey.

When you have completed the survey, please forward it to us by mail or fax.

Mail: Proficient Wealth Counselors, LLC - 77 Access Road, Suite 6 - Norwood, MA 02062

Fax: 1- 781-278-9489

Name: _____ Date: _____

I. Please rate the following areas with regard to *your representative (circle your selection)*:

1. How has working with Gerald Loftin improved your **knowledge of investments** and other financial products?

	Not Improved	Somewhat Improved	Improved	Very Improved
Gerald Loftin	1	2	3	4

2. How has working with Gerald Loftin improved your **confidence in your financial decision-making** (e.g. goal-setting, budgeting, allocations, insurance, etc.)?

	Not Improved	Somewhat Improved	Improved	Very Improved
Gerald Loftin	1	2	3	4

3. How **heavily do you rely** on Gerald Loftin in your financial decision-making?

	Not at All	Sometimes	Often	Always
Gerald Loftin	1	2	3	4

4. What would be the **ideal degree to which you would rely** on Gerald Loftin in your financial decision-making?

	Not at All	Sometimes	Often	Always
Gerald Loftin	1	2	3	4

5. How would you like your **relationship** with your representative **to improve**?
(Please be candid.)

II. Please rate your *overall relationship* with your representative:

	Not Satisfied	Somewhat Satisfied	Satisfied	Very Satisfied
Gerald Loftin	1	2	3	4

Thank you!

We at Proficient Wealth Counselors, LLC appreciate your feedback in helping us to continue to serve your needs.