

## We greatly value your opinion!

In an effort to continuously enhance the services that we provide, we would appreciate your taking the time to complete this Client Satisfaction 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: \_\_\_\_\_

### 1. Please rate our *communications with you (circle your selection)*:

	Not Satisfied	Somewhat Satisfied	Satisfied	Very Satisfied
Frequency of Communications	1*	2*	3	4
Appropriateness of Communications	1	2	3	4
Clarity of Communications	1	2	3	4
Depth/Scope of Communications	1	2	3	4

\*If you answered "Not Satisfied" or "Somewhat Satisfied" regarding the frequency of our communications, would you like to hear from us:

More often?  Less often?

How do you prefer receiving information from us?

Postal mail  E-Mail  Telephone  Fax  Internet  In person

### 2. Please tell us about your preferences for *reviewing your accounts*:

How frequently would you like to review your accounts with us?

Quarterly  Semiannually  Annually  Other \_\_\_\_\_

How do you prefer reviewing your accounts with us?

By telephone  Online  In person  Other \_\_\_\_\_

### 3. Please tell us about your preferences for *using our Web site*:

Are you interested in accessing your accounts online through our Web site [www.proficientwealth.com](http://www.proficientwealth.com)

Yes (contact us for a password)  No  I already use online access

If you currently use our Web site, please rate your *top three* uses of the site:

Rank (1 = highest)

- \_\_\_\_\_ Market updates
- \_\_\_\_\_ Account balance/holding information
- \_\_\_\_\_ Products and services offered
- \_\_\_\_\_ Articles, newsletters, and seminars
- \_\_\_\_\_ Biography of the firm
- \_\_\_\_\_ Referring a friend
- \_\_\_\_\_ Other \_\_\_\_\_

**4. Please tell us your preferences for *additional services/programs* you would like us to offer:**

Of the following **services**, which one might have the most benefit for you?

Rank (1 = highest)

- \_\_\_\_\_ Tax advice/CPA services
- \_\_\_\_\_ Legal advice/attorney services
- \_\_\_\_\_ Other \_\_\_\_\_

Of the following **outreach programs**, which three hold the most interest/value for you?

Rank (1 = highest)

- \_\_\_\_\_ Ongoing portfolio reviews
- \_\_\_\_\_ Regular market updates
- \_\_\_\_\_ Quarterly investment newsletters
- \_\_\_\_\_ Educational brochures on investing
- \_\_\_\_\_ Educational seminars on timely financial topics
- \_\_\_\_\_ Telephone conference calls on timely financial topics
- \_\_\_\_\_ Client appreciation events
- \_\_\_\_\_ Other \_\_\_\_\_

**5. Please rate our *service attitude (circle your selection)*:**

	Not Satisfied	Somewhat Satisfied	Satisfied	Very Satisfied
Office Appearance	1	2	3	4
Staff Helpfulness	1	2	3	4
Telephone Skills	1	2	3	4
Timeliness of Responses to Your Questions/Inquiries	1	2	3	4

What can we do to better assist you in the future?  
(Please be candid.)

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**6. Please rate your *overall satisfaction with our firm (circle your selection)*:**

Not Satisfied	Somewhat Satisfied	Satisfied	Very Satisfied
1*	2*	3	4

\*If you answered "Not Satisfied" or "Somewhat Satisfied," please explain how we can better meet your expectations.

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**Thank you!**

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