

Dear Client,

We continually strive to provide you with an exceptional level of service to meet all your financial needs.

To assist us in our ongoing commitment to you, we would be grateful if you could take a few moments to complete this form and return it to us in the enclosed envelope.

Score each statement regarding Peter Vickers and Associates by circling the number between 1 and 5 which best represents your opinion. *Note: 1 = strongly agree, 5 = strongly disagree*

1	Was the fee structure explained clearly before we commenced work?	1	2	3	4	5
2	Staff are approachable	1	2	3	4	5
3	Understand my problems	1	2	3	4	5
4	Provide solutions to my problems	1	2	3	4	5
5	Return calls promptly	1	2	3	4	5
6	The service range is broad enough to cover all my needs	1	2	3	4	5
7	Keeps me informed about relevant information as required	1	2	3	4	5
8	Keeps to set deadlines	1	2	3	4	5
9	Explains recommendations in writing clearly	1	2	3	4	5
10	Explains verbal recommendations clearly	1	2	3	4	5
11	Are professional in their approach	1	2	3	4	5
12	Rate your overall experience 1-5 where 1 is excellent	1	2	3	4	5

Have you encountered any problems in your dealings with us? If so, please briefly describe their nature.

What additional services would you like us to provide to you?

What could we do differently to provide a better experience for our clients?

Thank you for your time. If you're satisfied with our service, please consider referring us to your colleagues and friends. We are always grateful for your referrals.

Yours sincerely,

Your Name _____
(optional)
Date _____

Kathryn Maguire
Marketing Manager