



Client Service Survey

Please mark the appropriate column to tell me how well our firm meets your expectations in the following areas.

	Exceeds	Meets	Does Not Meet	No Opinion
Understanding your needs and concerns.	_____	_____	_____	_____
Understanding your business and industry.	_____	_____	_____	_____
Providing a strong network of professional sources.	_____	_____	_____	_____
Handling your work on a timely basis.	_____	_____	_____	_____
Promptly returning your phone calls and emails.	_____	_____	_____	_____
Partners and staff being available when needed.	_____	_____	_____	_____
Keeping you informed of the progress of your projects.	_____	_____	_____	_____
Satisfactorily resolving any issues that arise.	_____	_____	_____	_____
Treating you courteously.	_____	_____	_____	_____
Professional appearance of tax returns and other documents.	_____	_____	_____	_____
Providing appropriate and timely tax planning advice to you.	_____	_____	_____	_____
Helping you meet your tax and financial goals.	_____	_____	_____	_____
Providing the services and advice you need from us.	_____	_____	_____	_____
Providing creative solutions and innovative ideas to you.	_____	_____	_____	_____
Clearly communicating our fees and billing policies.	_____	_____	_____	_____
Reasonableness of fees for the services rendered.	_____	_____	_____	_____

Please explain how we failed to meet any or the above expectations.

	Yes	No
If the opportunity presented itself, would you recommend our firm to others?	_____	_____
May we use you as a reference? (If so, please list your name on the last line below.)	_____	_____
Can you recommend any changes that should be made in the way we do business? If yes, please describe.	_____	_____
Are there other services we can provide that would be of value to you, such as financial, estate, retirement, business succession, or college savings planning? If yes, in what area(s)?	_____	_____

Is there anything we can do to improve our service to you?

Other comments:

Your name (optional): _____