

**Thank you for completing this survey. Responses will be collected by a third party and you will not be identified. The intent of this survey is to improve upon our value to you.**

1. What was your first impression of us?

- Excellent
- Good
- Fair
- Poor
- Unacceptable

2. How has that impression changed over time?

- Very positively
- Somewhat positively
- Unchanged
- Somewhat negatively
- Very negatively

3. How long have you been a client?

- Less than one year
- One to two years
- Three to five years
- Over five years

4. We offer a variety of services including but not limited to: retirement planning, tax planning, estate planning, legacy planning, wealth management, long term care planning, succession planning and unique investment opportunities. Have you been provided with enough information to understand how all of our services might benefit you?

- Yes
- Unsure
- No

5. How would you compare our service to that of financial advisors you have previously worked with or heard about?

- Much better than others
- Somewhat better than others
- Same as others
- Somewhat worse than others
- Much worse than others

6. If there is a difference, what is that difference?

7. Do you see your relationship with us...

- Growing
- Staying the same
- Declining

8. If you only had three words to describe us, what would those words be?

9. Would you feel comfortable referring people to us?

- Yes
- No

10. Have you referred people to us?

- Yes
- No

11. Which of the following benefits do you value most in working with us? (check all that apply)

- Investment Management (returns, preservation, protection, growth, limited risk)
- Financial Planning (personalized to you, comprehensive)
- Professionalism (service, personal attention, integrity, empathy)
- Product Solutions (diversity, uniqueness, quality)
- Customer Service (responsiveness, assurance, reliability, communication)
- Network (access to other professionals)

12. We truly understand what is most important with you.

- Strongly agree
- Agree
- Unsure
- Disagree
- Strongly disagree

13. Please include any other comments (positive or learning opportunities) that you feel will help us do more of what is important to you.