



Client Focused Financial Planning  
*We share ideas*

**Following my initial meeting I always like to get feedback on how things went and how relevant it was. Here is what some clients have had to say.**

**POST DISCOVERY FEEDBACK**

Dear Stuart

Thank you for allowing me the opportunity to meet with you and to talk about your lifestyle financial planning needs. Like any business I want to make sure that I am giving people a positive experience and some value for the time they invest with me. To that end I would really appreciate 5 more minutes of your time to answer 5 questions. This is for my information only and I will not follow up any of your responses with you, so please feel free to express your true feelings.

I will fully understand if you don't have the time to do this.

1. Were you happy with the flexibility to arrange your initial discussion?

YES /  NO

2. Do you think I listened and understood your needs?

YES /  NO

3. Was our time together of value to you?

YES /  NO

4. Did you walk away from our meeting knowing more than when you walked in?

YES /  NO

5. Would you ever consider suggesting a friend, colleague or family talk to me?

YES /  NO

Any other comments: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Your help in completing this survey will be greatly appreciated and is an important part of me trying to make sure I am relevant to the people I meet.



**DISCOVERY FEEDBACK**

Dear Margaret and Raj

Thank you for allowing me the opportunity to meet with you and to talk about your lifestyle financial planning needs. Like any business I want to make sure that I am giving people a positive experience and some value for the time they invest with me. To that end I would really appreciate 5 more minutes of your time to answer 5 questions. This is for my information only and I will not follow up any of your responses with you, so please feel free to express your true feelings.

1. Were you happy with the flexibility to arrange your initial discussion?

YES

2. Do you think I listened and understood your needs?

YES

3. Was our time together of value to you?

YES

4. Did you walk out from our meeting knowing more or having a better understanding of your options than when you walked in?

YES

5. Would you ever consider suggesting a friend, colleague or family member talk to me?

YES

Any other comments: \_\_\_\_\_ Appreciate the time taken to do preparation for our meeting. I walked out of our first meeting knowing that some thought was put in before we met and that made me confident we were working with the right person. \_\_\_\_\_

\_\_\_\_\_

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### DISCOVERY FEEDBACK

Dear Cindy and Gary

Thank you for allowing me the opportunity to meet with you and to talk about your lifestyle financial planning needs. Like any business I want to make sure that I am giving people a positive experience and some value for the time they invest with me. To that end I would really appreciate 5 more minutes of your time to answer 5 questions. This is for my information only and I will not follow up any of your responses with you, so please feel free to express your true feelings.

1. Were you happy with the flexibility to arrange your initial discussion?

YES

2. Do you think I listened and understood your needs?

YES

3. Was our time together of value to you?

YES

4. Did you walk out from our meeting knowing more or having a better understanding of your options than when you walked in?

YES

5. Would you ever consider suggesting a friend, colleague or family member talk to me?

YES

Any other comments: \_\_\_\_\_ looking forward to working with you

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Your help in completing this survey will be greatly appreciated and is an important part of me trying to make sure I am relevant to the people I meet.