

Name: _____

Client #: _____

Please rate our performance in the various categories by checking the appropriate number between 5 and 1 with 5 being the most satisfied and 1 being the least satisfied. (If not applicable to your circumstances, please indicate "X" in the N/A column.)

How Did We Do?

1. ACCOUNTING ADVISOR

- a) Does your accounting advisor respond to your questions in a timely manner?
- b) Does your accounting advisor explain the results of our work adequately?
- c) Does your accounting advisor answer questions to your satisfaction?

2. OUR SERVICES

- a) Are we fulfilling all of the accounting and tax services that you require?
- b) Are we explaining alternative tax strategies?
- c) Would you recommend our services to others?

3. OFFICE CONTACT

- a) Were communications with office staff handled to your satisfaction?
- b) Were communications with office staff timely?

4. COMMUNICATION

- a) How would you rate our annual Allied Advantage newsletter?
- b) Would you prefer to receive statements, reports and letters in paper format or electronically (email or portal)?
- c) Would you like to follow us on social media (Facebook, Twitter, etc.)?
- d) How frequently would you like to receive our newsletter?

Most Satisfied		>	Least Satisfied		
5	4	3	2	1	N/A

Paper		Electronically		
Yes	No	Already	Follow	
Annual	Quarterly	Monthly	N/A	

In addition to our income tax and accounting services, Allied provides many other services. Please indicate (✓) topics of interest to you and if you prefer to receive informative literature and/or arrange a consultation.

Send Information	Arrange Consultation
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- a) Succession planning & related tax implications
- b) Estate planning & related tax implications
- c) Business reorganization (incorporation of holding company)
- d) Potential sale planning & related tax implications
- e) Business planning including financial projections and cash flows
- f) Accounting software training

How Can We Improve?

Please indicate any suggestions you may have to improve our service for next year.

Voice Your Concerns

Please indicate any concerns you may have about any aspect of your business or financial affairs which have not been adequately addressed by our services.

*Thank you for taking the time to complete this questionnaire.
Please be assured all replies will be held in the strictest confidence.*



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