

## Annual Client Feedback Form

Dear Client,

Thank you for giving us the opportunity of being of service to you and your family and being a part of your financial journey.

May we request you to give us your valuable feedback on our services. This will be of great help to us to improve and deliver better services in the future. Thank you.

Your Name: \_\_\_\_\_ Date: \_\_\_\_\_

A/c No : \_\_\_\_\_

### 1. Overall, how satisfied or dissatisfied are you with our services?

- Very satisfied
- Somewhat satisfied
- Neither satisfied nor dissatisfied
- Somewhat dissatisfied
- Very dissatisfied

### 2. Which of the following words would you use to describe us? Skip if none.

- Reliable
- Quality
- Useful
- Caring
- Knowledgeable
- Professional

### 3. How would you rate the quality of our services?

- Very high quality
- High quality
- Neither high nor low quality
- Low quality
- Very low quality

### 4. How responsive have we been to your questions or requests or concerns?

- Extremely responsive
- Very responsive
- Somewhat responsive
- Not so responsive
- Not at all responsive

5. How likely is it that you would recommend our services to a friend, relative or colleague?

Not at all likely

Extremely likely

0	1	2	3	4	5	6	7	8	9	10
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6. Do you have any suggestions for us to improve our services and deliver better?

7. May we request you to give us a testimonial which we may publish in our website etc.  
(Your name will be kept confidential or shared as per your consent).

8. Do you want to share any other comments, questions, or concerns?

Thank you for your valued feedback.

Optional Question

Kindly refer Your Friends Who may Benefit from our services

Do you think any of your friends or relatives may benefit from services of a professional financial consultants like us. We have the capability to add few more clients and would be happy to work with your friends and family.

Share names here. Will first have a word with you and then reach out to them. As a token of appreciation, we shall be sending you a surprise gift for every referral. Thanks.

Name	Mobile No	E mail
1)		
2)		
3)		



**BALAJI SERVICES**