

EVALUATION FORM

Please use this form to evaluate the meeting we have just concluded.

Name _____ Date _____

Contact information _____

Please rate the following aspects of today's meeting/discussion:

	<i>Poor</i>			<i>Excellent</i>	
Overall meeting	1	2	3	4	5
Selwyn as your financial planner	1	2	3	4	5
Our interaction together	1	2	3	4	5
Quality of the review	1	2	3	4	5
_____	1	2	3	4	5
_____	1	2	3	4	5
My Concerns were Met	1	2	3	4	5

Do you understand why you own what you do? _____

Do you understand how I get paid? _____

What were the strengths of the meeting? _____

How do you feel we add value for you? _____

What are we currently doing that makes you feel concerned? _____

What are we *not* doing that you would like to see us do? _____

What are the next steps? _____

Thank you for your comments.

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