## Financial Planning Services Evaluation Form

**Real World Personal Finance Software**

**(503) 309-1369** **support@toolsformoney.com**[**http://www.toolsformoney.com/**](http://www.toolsformoney.com/)

### Dear Mr. & Mrs. Sample,

Please complete this form and return it to us. Completing this form will better help us learn how to best serve your needs.

If you feel we should explore an area of your financial plan, or an area that wasn’t in you financial plan, please check the *Explore* box. If you are satisfied that we covered this area in your financial plan, please check the *Satisfied* box. If you feel there is more work to be done in part of your financial plan, please check the *Review* box.

 **Explore Satisfied Review**

Family Budgeting and Cash Flow [ ]  [ ]  [ ]

Personal Net Worth [ ]  [ ]  [ ]

Retirement Planning Projections [ ]  [ ]  [ ]

Investment Management [ ]  [ ]  [ ]

Risk Management and Insurance Planning [ ]  [ ]  [ ]

College Planning [ ]  [ ]  [ ]

Estate Planning [ ]  [ ]  [ ]

Plans of Action [ ]  [ ]  [ ]

Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [ ]  [ ]  [ ]

Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [ ]  [ ]  [ ]

Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [ ]  [ ]  [ ]

Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [ ]  [ ]  [ ]

Your opinion counts!

We want to make this presentation better each time we provide it. As the intended audience, you are the best judge of our work. We need your comments to improve the quality and value of this seminar.

 YES Neutral NO

The information was helpful: 5 4 3 2 1

The information was presented clearly: 5 4 3 2 1

The planners were well prepared: 5 4 3 2 1

The visuals were easy to read: 5 4 3 2 1

The speakers held my interest: 5 4 3 2 1

The room was comfortable: 5 4 3 2 1

I would come to another seminar: 5 4 3 2 1

I would recommend your services to others: 5 4 3 2 1

Which part of the financial plan was most helpful? How could we improve?

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