

# Top Questions for a Financial Advisor Client Survey

A client survey is an opportunity to unlock insights about your client base and what they value in an exceptional advice experience.

Financial professionals can choose from the lists of questions below to develop a survey that will help you gain valuable client feedback to inform your client experience.

## Likert Scale Questions:



These questions provide a continuum to measure attitudes and perceptions of the client experience.

*Choose up to 5 from this category*

### Loyalty and Overall Experience

- How satisfied are you with the overall experience?
- How likely are you to continue using our services?
- How likely are you to recommend our services?
- How confident do you feel that the advice provided is unbiased?
- How satisfied are you with our progress meeting the expectations set in our service agreement?
- How satisfied are you with our progress tailoring the experience to you?
- How satisfied are you with the technology offered to engage with our services?

### Engagement Frequency and Format

- How satisfied are you with access to our financial professionals [our team]?
- How satisfied are you with the frequency of our meetings? (virtual or in-person meetings)
- How satisfied are you with the frequency of our client communications? (outreach via emails, newsletters, updates, etc.)
- How satisfied have you been in the response time to your questions?
- How satisfied are you in the format of our meetings? (virtual or in-person meetings)
- How satisfied are you with the technology offered to communicate with our team?

## Open-ended Questions:



Receive qualitative feedback so you can understand what is most valuable to your clients.

*Choose 1-2 questions from this category*

- What do you value most about our service?
- How can we make our service better?
- What would you like to see change?
- What other services or strategies are you interested in learning more about? (Example: impact investing, charitable giving, holistic planning)
- Are there ways we could better engage you in the planning process?

## Demographics Questions:



Gain insight into the different segments of your client base.

*Use if wide variability exists*

- Select your age range (<30) (30-44) (45-59) (>60)
- How long have you been a client? (0-1 year) (1-5 years) (5-10 years) (Over 10 years)

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