



Client Satisfaction Survey

Completed by: _____

It is our goal to continually improve our services and ensure we are living up to your expectations. We appreciate your feedback as it will help to shape our relationship going forward.

Please rate each area on a scale from one to five

1 = Strongly Disagree | 3 = Neutral, Not Sure, Don't Know | 5 = Strongly Agree

COMMUNICATION

I am satisfied with the frequency, type, and amount of communication I receive.

Strongly Disagree 1 2 3 4 5 Strongly Agree

Write your thoughts below.

The information and explanations I receive are clear and understandable.

Strongly Disagree 1 2 3 4 5 Strongly Agree

Write your thoughts below.

CLIENT SERVICE

My questions, or requests, are handled quickly and to my satisfaction.

Strongly Disagree 1 2 3 4 5 Strongly Agree

Write your thoughts below.

I am always kept informed regarding the status of my accounts and investments.

Strongly Disagree 1 2 3 4 5 Strongly Agree

Write your thoughts below.

YOUR ACCOUNT

My unique objectives and concerns are heard, understood, and taken into consideration.

Strongly Disagree **1** **2** **3** **4** **5** *Strongly Agree*

Write your thoughts below.

I feel confident in the diversification of investments and strategies being implemented in my accounts.

Strongly Disagree **1** **2** **3** **4** **5** *Strongly Agree*

Write your thoughts below.

GENERAL QUESTIONS

I find the website capital-wm.com to be useful and informative.

Strongly Disagree **1** **2** **3** **4** **5** *Strongly Agree*

Write your thoughts below.

I would refer my friends, family or colleagues to your firm.

Strongly Disagree **1** **2** **3** **4** **5** *Strongly Agree*

Referrals are the primary way Murphy Financial Services grows. If you agreed with the statement above, and know someone that would benefit from receiving information about our firm, please provide their contact information below.

Name: _____ **Phone:** _____

Email: _____

Address: _____

In general, I am completely satisfied with my experience as a client.

Strongly Disagree **1** **2** **3** **4** **5** *Strongly Agree*

Please elaborate. Where do we excel? Where could we improve? _____

6212 Katella Ave ▪ Ste 250 ▪ Cypress ▪ CA ▪ 90630 ▪ (714) 821-1777

Securities and investment advisory services offered through Osaic Wealth, Inc. member FINRA/SIPC. Osaic Wealth is separately owned, other entities and/or marketing names, products or services referenced here are independent of Osaic Wealth. Evan Ocepek is a licensed insurance agent and, in such capacity, may recommend and help with the purchase of various insurance products directly through the selected carrier. CA Life Insurance #0H34782.