

Summit Financial Consulting, L.L.C.

A Registered Investment Advisory Firm
Client Customer Service Survey

Names

Date _____

Full Name

(1) _____ (2) _____

Preferred Nickname

(1) _____ (2) _____

Phone Numbers and E-mail Addresses

Please checkmark the best way to contact you.

Home Phone: _____ _____

Work Phone: _____ _____

Cell Phone: _____ _____

Home E-mail: _____

Work E-mail: _____

Please tell us the best time to contact you:

Daytime	Evening
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Meetings , Updates and On-Line Access

How often would you like us to have face to face review meetings?

Only When Necessary Annually Semi-Annually

How often would you like an update?

Only When Necessary Annually Semi-Annually Quarterly

How would you prefer to receive them?

Home Phone Home E-mail Work Phone Work E-mail Cell

Would you like on-line access to your accounts? Yes No

Robert L. Wink, Jr. • 39090 Garfield Road, Suite 105, Clinton Township, MI 48038 • (586) 226-2100
Wayne H. Hansen, CFP® • 2277 Science Parkway, Suite 7, Okemos, MI 48864 • (517) 347-2550
Jeffrey W. Hansen, CFP®, CWS® • 124 State Street, Suite 200, Howell, MI 48843 • (517) 579-7326
www.summitfc.net • (866) 508-5175 • Fax: (586) 569-4312

Personal Preferences

When visiting our office, which do you prefer to drink?

Coffee	<input type="checkbox"/>	<input type="checkbox"/> Regular	<input type="checkbox"/> Decaf	<input type="checkbox"/>	<input type="checkbox"/> Regular	<input type="checkbox"/> Decaf
Hot Tea	<input type="checkbox"/>			<input type="checkbox"/>		
Iced Tea	<input type="checkbox"/>			<input type="checkbox"/>		
Other	<input type="checkbox"/>			<input type="checkbox"/>		
Soda	<input type="checkbox"/>			<input type="checkbox"/>		
Water	<input type="checkbox"/>			<input type="checkbox"/>		

What is your favorite snack?

Which type of chocolate do you prefer?

Milk Chocolate	<input type="checkbox"/>	<input type="checkbox"/>
Dark Chocolate	<input type="checkbox"/>	<input type="checkbox"/>
No preference	<input type="checkbox"/>	<input type="checkbox"/>
Don't care for chocolate	<input type="checkbox"/>	<input type="checkbox"/>

What newspaper do you read or access via the Internet the most?

Which type of wine do you prefer?

Red	<input type="checkbox"/>	<input type="checkbox"/>
White	<input type="checkbox"/>	<input type="checkbox"/>
No preference	<input type="checkbox"/>	<input type="checkbox"/>
Don't drink wine	<input type="checkbox"/>	<input type="checkbox"/>

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Which two of these magazines appeal to you the most that you do not currently subscribe to?

Better Homes&Gardens	<input type="checkbox"/>	<input type="checkbox"/>	Maxim	<input type="checkbox"/>	<input type="checkbox"/>
Cabela's	<input type="checkbox"/>	<input type="checkbox"/>	Men's Health	<input type="checkbox"/>	<input type="checkbox"/>
Car and Driver	<input type="checkbox"/>	<input type="checkbox"/>	Men's Journal	<input type="checkbox"/>	<input type="checkbox"/>
Celebrity Hairstyles	<input type="checkbox"/>	<input type="checkbox"/>	National Wildlife	<input type="checkbox"/>	<input type="checkbox"/>
ESPN	<input type="checkbox"/>	<input type="checkbox"/>	Newsweek	<input type="checkbox"/>	<input type="checkbox"/>
First for Women	<input type="checkbox"/>	<input type="checkbox"/>	Outdoor Life	<input type="checkbox"/>	<input type="checkbox"/>
Fitness	<input type="checkbox"/>	<input type="checkbox"/>	Popular Science	<input type="checkbox"/>	<input type="checkbox"/>
Glamour	<input type="checkbox"/>	<input type="checkbox"/>	Redbook	<input type="checkbox"/>	<input type="checkbox"/>
Golf Digest	<input type="checkbox"/>	<input type="checkbox"/>	Shape	<input type="checkbox"/>	<input type="checkbox"/>
Golf for Women	<input type="checkbox"/>	<input type="checkbox"/>	Time	<input type="checkbox"/>	<input type="checkbox"/>
Golf Tips	<input type="checkbox"/>	<input type="checkbox"/>	Vanity Fair	<input type="checkbox"/>	<input type="checkbox"/>
GQ	<input type="checkbox"/>	<input type="checkbox"/>	Woman's Health	<input type="checkbox"/>	<input type="checkbox"/>
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	Other: _____	<input type="checkbox"/>	<input type="checkbox"/>

What date were you /will you be married? _____

	Name	Name
Do you play golf?	<input type="checkbox"/>	<input type="checkbox"/>
Do you play tennis?	<input type="checkbox"/>	<input type="checkbox"/>
Do you enjoy the theater?	<input type="checkbox"/>	<input type="checkbox"/>
Do you belong to a gym?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a hobby?	<input type="checkbox"/>	<input type="checkbox"/>
	_____	_____
	_____	_____
	_____	_____

What is your favorite hometown attraction?

What is your favorite restaurant/cuisine?

Who is your favorite author?

What is your favorite charitable organization?

What kind of pets do you have? What are their names?

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Shirt Size (S, M, L, XL, etc.):

Do you have season tickets for any sports? Who are your favorite teams?

Do you belong to a union and/or professional organization?

Changes/Other

Are there any changes coming in the future that I should know about?

Is there a CD, 401(k), or inheritance coming due in the near future?

Is there anything I can do that would improve my overall service to you?

Do you have any questions or comments for me?

Do you have any friends, family, co-workers, or acquaintances that are in a similar financial situation as yourself that you could introduce me to?

Thank you very much for completing this survey, it will help us serve you better in the future. We appreciate you!

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