

STRACK ASSOCIATES

CLIENT SURVEY RESULTS

January 12, 2006

Total Responses: 44

Business Questions

1. Are your financial statements adequately discussed with you?

Sometimes	4	16.67%
Yes	20	83.33%
No	0	0.00%

2. Would you like to have graphs as part of your financial statements?

Sometimes	1	4.55%
Yes	5	22.73%
No	16	72.73%

3. Would you like my written comments preparing current financial statements with prior statements?

Sometimes	3	13.04%
Yes	9	39.13%
No	11	47.83%

4. Would you like my assistance in preparing budgets and cash flow projections?

Sometimes	2	8.70%
Yes	2	8.70%
No	19	82.61%

5. Would you like my Firm to help train your in-house accounting personnel?

Sometimes	0	0.00%
Yes	0	0.00%
No	21	100.00%

6. Would you like my Firm to assist you with a computer or software selection?

Sometimes	4	20.00%
Yes	3	15.00%
No	13	65.00%

7. Do you think your bookkeeping system needs streamlining?

Sometimes	3	14.29%
Yes	4	19.05%
No	14	66.67%

8. Do you think your billing and accounts receivable policy is adequate?

Sometimes	1	5.26%
Yes	16	84.21%
No	2	10.53%

9. Does my office personnel seem knowledgeable about your business?

Sometimes	0	0.00%
Yes	20	95.24%
No	1	4.76%

10. Does my Firm help implement changes which I suggest?

Sometimes	3	16.67%
Yes	13	72.22%
No	2	11.11%

11. Do you want due date notices mailed to you for all important filing dates?

Sometimes	0	0.00%
Yes	7	33.33%
No	14	66.67%

General Questions

1. Do I return your telephone calls promptly?

Sometimes	4	9.09%
Yes	39	88.64%
No	0	0.00%
No Answer	1	2.27%

2. Do you have to call my Firm to find out the status of your work?

Sometimes	12	27.27%
Yes	7	15.91%
No	23	52.27%
No Answer	2	4.55%

3. Do you feel I listen when you talk?

Sometimes	0	0.00%
Yes	43	97.73%
No	0	0.00%
No Answer	1	2.27%

4. Do I offer you enough tax planning advice?

Sometimes	4	9.09%
Yes	34	77.27%
No	2	4.55%
No Answer	4	9.09%

5. Do I use language that is too technical for you to understand?

Sometimes	5	11.36%
Yes	1	2.27%
No	37	84.09%
No Answer	1	2.27%

6. Do you follow the advice I have given you?

Sometimes	9	20.45%
Yes	34	77.27%
No	0	0.00%
No Answer	1	2.27%

7. Do you feel my advice is beneficial and profitable?

Sometimes	2	4.55%
Yes	40	90.91%
No	0	0.00%
No Answer	2	4.55%

8. Do I complete your work when promised?

Sometimes	3	6.82%
Yes	40	90.91%
No	0	0.00%
No Answer	1	2.27%

9. Am I readily available when needed?

Sometimes	6	13.64%
Yes	37	84.09%
No	0	0.00%
No Answer	1	2.27%

10. Does my office or my staff make you feel intimidated?

Sometimes	1	2.27%
Yes	1	2.27%
No	41	93.18%
No Answer	1	2.27%

11. Do you read my newsletter?

Sometimes	5	11.36%
Yes	38	86.36%
No	0	0.00%
No Answer	1	2.27%

12. Do you find our website informative and easy to use?

Have not visited	39	88.64%
Sometimes	0	0.00%
Yes	3	6.82%
No	1	2.27%
No Answer	1	2.27%

13. Do you feel that I appreciate your business?

Sometimes	0	0.00%
Yes	40	90.91%
No	1	2.27%
No Answer	3	6.82%

14. Choose your preferred method of receiving reports:

(Please note that in some responses, multiple boxes were checked)

Pick up at office	10	22.73%
Postal Mail	30	68.18%
Fax	2	4.55%
E-mail	7	15.91%

Tax and Financial Planning Questions

1. Would you like me to review your Will for tax considerations?

Sometimes	4	9.09%
Yes	13	29.55%
No	20	45.45%
No Answer	7	15.91%

2. Would you like me to review your insurance policies for tax considerations?

Sometimes	6	13.64%
Yes	6	13.64%
No	24	54.55%
No Answer	8	18.18%

3. Would you like me to assist you with personal financial planning?

Sometimes	8	18.18%
Yes	8	18.18%
No	23	52.27%
No Answer	5	11.36%

4. Would you read additional financial articles or newsletters if we send them to you?

Sometimes	8	18.18%
Yes	31	70.45%
No	3	6.82%
No Answer	2	4.55%

5. Would you recommend my Firm to others?

Sometimes	0	0.00%
Yes	43	97.73%
No	1	2.27%
No Answer	0	0.00%

Please let me know how you feel my Firm rates in the following categories:

	Excellent	Good	Average	Fair	Poor	No Answer
Professional knowledge	86.36%	11.36%	0.00%	0.00%	0.00%	2.27%
Efficiency	72.73%	25.00%	0.00%	0.00%	0.00%	2.27%
Courtesy of our staff	88.64%	6.82%	2.27%	0.00%	0.00%	2.27%
Prompt responses	72.73%	25.00%	0.00%	0.00%	0.00%	2.27%
Communicate ideas	52.27%	38.64%	6.82%	0.00%	0.00%	2.27%
Office cleanliness	65.91%	27.27%	2.27%	0.00%	0.00%	4.55%
Parking	47.73%	29.55%	11.36%	0.00%	6.82%	4.55%
Timeliness of work done	65.91%	31.82%	0.00%	0.00%	0.00%	2.27%
Appointments kept	90.91%	6.82%	0.00%	0.00%	0.00%	2.27%
Overall impression	75.00%	22.73%	0.00%	0.00%	0.00%	2.27%