



**SHAH & TRIVEDI CPA, PLLC**  
Certified Public Accountants and Wealth Planners

**CLIENT SURVEY**

Please fill in the contact information below so that we may update our database with your most current information and be able to provide you with information timely from our firm.

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Company Name: \_\_\_\_\_  
Street Address: \_\_\_\_\_  
PO Box: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_ Extension: \_\_\_\_\_  
Fax: \_\_\_\_\_  
Email address: \_\_\_\_\_  
Website address: \_\_\_\_\_

**1. Please put an "X" in the box that best describes your response to the following statements about the firm.**

	Exceeds Expectation	Meets Expectation	Below Expectation
Overall satisfaction with the firm			
Performs their services with minimum disruption to my business			
Understands my business and industry			
Listens and understands my needs and goals			
Is timely and meets my deadlines			
Responds quickly to requests			
Has knowledge to answer technical questions			
Provides good value for fees paid			

**2. Please put an "X" in the box below. Compared to last year's performance, the firms performance is:**

Much improved	Improved	About the Same	Worse	Much worse

**What, if anything, has changed?**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. Why did you select and/or retain our firm? Please rank reasons in order, with 1 being most important.

Reason	Rank
Reputation	_____
Competitive fees	_____
Range of services	_____
Industry expertise	_____
Technical expertise	_____
Service philosophy	_____
Chemistry with the firm	_____
Referred by trusted third-party	_____
Relationship with someone at the firm	_____
Other (please explain)	_____

4. What do you like most about the firm?

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5. What do you like least about the firm?

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6. Would you recommend our firm to others?

Yes \_\_\_\_\_ No \_\_\_\_\_

7. Please tell us anything else you think we should know about the firm, including services you would like to have offered. Use additional sheets if necessary.

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8. If you would like to discuss a special concern not covered in the survey, please check the box below. Kirti Shah, CPA, the managing partner of the firm, will contact you immediately.

Please contact me \_\_\_\_\_

**Thank you for your time and evaluation of the firm!**