



3/13/18

Dear Valued Client,

We greatly appreciate you for allowing The Forte Group to assist with your retirement planning, Medicare benefit questions, and long-term care insurance services; we are always looking for ways to grow and improve on our services and offerings.

Recently we worked with you to meet your financial goals. We are writing to ask for your feedback on our recent services and have enclosed a self-addressed, stamped envelope for you to return this quick questionnaire to us.

Thank you for choosing The Forte Group!

Thomas Cassidy
CA LICENSE #0601631

SERVICE QUESTIONNAIRE

Why did you choose us as your service provider? _____

What service did we perform for you? _____

How would you rate the service you received? (Scale of 1-5) _____

In which areas did we meet or exceed your expectations? _____

In which areas can we improve? _____

Would you recommend us to others? Why or why not? _____

We love your feedback! Return this form to be entered in our monthly drawing for a \$25 gift certificate!