|  |  |
| --- | --- |
|  | Tax evaluation  Please type or write your responses below |

As part of our ongoing effort to improve service to our clients, we are providing the evaluation below. We appreciate you taking the opportunity to provide feedback and comments about your recent experience with your Firm Name tax team.

To help us provide better service, please rate the following categories: (PLEASE CHECK ONLY ONE IN EACH ROW)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  | | **Needs**  **improvement** | **Satisfactory** | | **Exceptional** |
| 1 | The tax team maintained a satisfying level of communication throughout the tax preparation process. | | ☐ | ☐ | | ☐ |
| 2 | The personal conduct of the tax team was professional and courteous. | | ☐ | ☐ | | ☐ |
| 3 | The tax team was thorough in its review of your tax information and asked meaningful questions. | |  |  | |  |
| 4 | The tax team presented observations to you in a clear and concise manner. | | ☐ | ☐ | | ☐ |
| 5 | A draft of the tax return was adequately discussed, and any problems were resolved before the tax returns were formally presented. | | ☐ | ☐ | | ☐ |
| 6 | Overall, you received benefits from this tax work that will assist you in the future. | | ☐ | ☐ | | ☐ |
| 7 | Would you refer us to a friend, family member or business associate? (check only one) | YES ☐ | | | NO ☐ | |
| 8. Comments (type or write below): | | | | | | |

Thank you for your feedback! If you have questions or further comments, please contact us.

**RETURN THIS DOCUMENT:** Please send via email to email address or mail to name at the firm name address listed below.

|  |  |
| --- | --- |
|  | Audit evaluation  Please type or write your responses below |

As part of our ongoing effort to improve service to our clients, we are providing the evaluation below. We appreciate you taking the opportunity to provide feedback and comments about your recent audit with firm name.

To help us provide better service, please rate the following categories: (PLEASE CHECK ONLY ONE IN EACH ROW)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  | **Needs**  **improvement** | | **Satisfactory** | | **Exceptional** |
| 1 | The audit team adequately explained the audit approach and scope before starting the audit. | ☐ | | ☐ | | ☐ |
| 2 | The audit team maintained a satisfying level of communication throughout the audit. | ☐ | | ☐ | | ☐ |
| 3 | The personal conduct of the audit team was professional and courteous. | ☐ | | ☐ | | ☐ |
| 4 | The audit team challenged the status quo, exhibiting appropriate curiosity. | ☐ | | ☐ | | ☐ |
| 5 | The audit team presented the results of the audit clearly. | ☐ | | ☐ | | ☐ |
| 6 | The recommendations were reasonable and meaningful. | ☐ | | ☐ | | ☐ |
| 7 | The draft report was adequately discussed, and any problems were resolved before the report was formally presented and issued. | ☐ | | ☐ | | ☐ |
| 8 | Overall, you received benefits from this audit that will assist you in the future. | ☐ | | ☐ | | ☐ |
| 9 | Would you refer us to a friend, family member or business associate? (check only one) | | YES ☐ | | NO ☐ | |
| 10. Comments (type or write below): | | | | | | |

Thank you for your feedback! If you have questions or further comments, please contact us.

**RETURN THIS DOCUMENT:** Please send via email to email address or mail to name at the firm name address listed below.