

Customer Survey

NAME: _____

Please rate us on a scale of 1 to 5 on the following (5 being the best)

1. The levels of financial advice you received from our "Loan Officer". _____
2. The degree of efficiency & proactive service you received from his team. _____
3. The degree in which we met your expectations on time frames, such as loan approval, closing, etc... _____
4. The amount of estimated closing costs vs. what you actually paid. _____
5. The level of courtesy from our staff. _____
6. The level of efficiency and clarity in getting your questions answered. _____
7. The overall experience of working with us. _____

Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

 2. What suggestions do you have for improving the level of our service?

 3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

 4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...

 5. Are your phone numbers changing? New home #

 6. Would you recommend our team to a friend or relative?

 7. Who do you know who is in need of our services at this time?

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