

Financial Advisor Annual Review Survey Template

All questions are optional. Follow each question's directions.
Write your answers to the open questions in the space provided.

Use these seven questions as a focused starting point. Every question is optional. The template is original editorial content, not a validated scale or financial assessment.

1. Do your stated financial goals need a formal update?

- ☐ Yes
- ☐ No
- ☐ Not sure
- ☐ I prefer to discuss this privately

2. How clear was the meeting agenda?

- ☐ Not at all clear
- ☐ Slightly clear
- ☐ Moderately clear
- ☐ Very clear
- ☐ Extremely clear

3. How clear were the explanations of progress and recommendations?

- ☐ Not at all clear
- ☐ Slightly clear
- ☐ Moderately clear
- ☐ Very clear
- ☐ Extremely clear

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4. How much opportunity did you have to ask questions?

- ☐ None
- ☐ A little
- ☐ A moderate amount
- ☐ A lot
- ☐ A great deal
- ☐ I had no questions

5. How well did the discussion reflect the priorities you stated?

- ☐ Not at all well
- ☐ Slightly well
- ☐ Moderately well
- ☐ Very well
- ☐ Extremely well
- ☐ Not sure

6. How clear were the agreed next steps?

- ☐ Not at all clear
- ☐ Slightly clear
- ☐ Moderately clear
- ☐ Very clear
- ☐ Extremely clear
- ☐ No next steps were needed

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7. What one topic or process change would improve the next review?
