

EVALUATION OF OUR SERVICES

Please take a moment to complete the form below, and return to us with your signed copy of the Form 5500-EZ. Your responses can help us improve our service to you. Thank you very much!

Plan Name: _____ Plan Type: _____

Person Responding: _____ Date: _____

For each of the following categories about our firm, please circle the appropriate response. We would also appreciate any additional input you may have. Please write your comments in the space provided.

On a scale of one to ten, one being the lowest and ten indicating your highest satisfaction, please rate Kravitz on the following.											
Consulting Skills: <i>We are knowledgeable and provide proactive useful advice.</i>	N/A	1	2	3	4	5	6	7	8	9	10
User Friendly: <i>The information we provide is easy to understand.</i>	N/A	1	2	3	4	5	6	7	8	9	10
Accuracy: <i>Our work is accurate.</i>	N/A	1	2	3	4	5	6	7	8	9	10
Timeliness: <i>We meet our time commitments by returning calls and emails within 24 hours.</i>	N/A	1	2	3	4	5	6	7	8	9	10
Deadlines: <i>We meet the deadlines we've negotiated with you for things such as contribution calculations.</i>	N/A	1	2	3	4	5	6	7	8	9	10
Integrity: <i>We are trustworthy.</i>	N/A	1	2	3	4	5	6	7	8	9	10
Billing of Fees: <i>We stay within our agreed upon budget.</i>	N/A	1	2	3	4	5	6	7	8	9	10
Plan Satisfaction: <i>Your plan is providing the level of benefits and accomplishing the goals that it was designed to achieve.</i>	N/A	1	2	3	4	5	6	7	8	9	10
Plan Administration: <i>Your plan runs smoothly because of our help.</i>	N/A	1	2	3	4	5	6	7	8	9	10
Meeting Your Expectations: <i>You are receiving the quality of services you expected when you hired us.</i>	N/A	1	2	3	4	5	6	7	8	9	10
What do you value most about doing business with Kravitz?											
What can Kravitz do to improve our service Level for your organization?											
On a scale of one to ten, what is the likelihood that you would refer a friend or colleague to Kravitz?	N/A	1	2	3	4	5	6	7	8	9	10

Please mail this survey back to us with your signed copy of the Form 5500-EZ. Thank you again for your help.

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