**Change the Conversation**

Sample Client Survey Questions to Ask in a Time of Crisis

Given that it is not always possible to meet or talk with all clients during turbulent times, consider capturing client sentiment through a survey exercise.

Below are a number of questions you could consider sharing with clients through an electronic survey. For more information on how to create an online survey, download our resource [here.](https://assetmark.sharefile.com/d-s00ccada72e64f1cb)

1. Are you concerned how the current market volatility has impacted your long-term plan?

(strongly agree to strongly disagree)

1. Are we communicating with your frequently enough during this current market environment?

(strongly agree to strongly disagree)

1. Are you experiencing a life transition that would warrant a meeting?

(yes/no)

1. Would you like to receive more educational resources/newsletters/social media posts?

(yes/no)

1. If offered, would you like to join a web-based meeting where our firm shares more insights into recent volatility?

(yes/no)

1. Is our firm providing value above and beyond investment performance?

(strongly agree to strongly disagree)

1. Are you confident that the financial plan you have in place will allow you to reach your financial goals?

(strongly agree to strongly disagree)

1. Is there anything else we can help you with at this time?

(open-ended)

**IMPORTANT INFORMATION**

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