Exit interview - template

The following has been prepared as a baseline, which can be adapted by a firm to fit its own unique 'modus operandi'.

When seeking feedback from a client who has recently left your practice, we suggest that you contact the client within 4-6 weeks of completion of the exit.

We were disappointed that you recently decided to leave our firm, but of course, we respect your decision to do so. To ensure we continue to improve our service to clients, would you mind taking a few minutes to answer these questions. I can assure you that your feedback will only be used to improve the experience for all our other clients.
1. Would you please advise the primary reason (more than one may apply) why you decided to leave us:
Service
☐ Responsiveness to queries
☐ Communication
☐ Accessibility to your adviser
☐ Performance of your financial plan
☐ Office location, parking, general accessibility
Staff/advisers
☐ Technical competence, experience
☐ Professionalism
☐ Ability to connect, empathise
2. What did you like best about our practice?

3. What did you like least about our practice?
4. Would you like to make any other comments or suggestions?

We greatly appreciate your time and feedback, thank you. Please accept our very best wishes for the future.