

O'Connor & Associates  
SURVEY

NAME

Al Creighton

~ Thank you for your time in completing this 5 - question survey. This will only take 10 minutes.  
Please return it in the postage-paid envelope provided at your earliest convenience. ~

Although you are in the pending phase of your policies/accounts being set up, please describe:

- 1) Your experience in dealing with me and my office up to this point:

Very positive! You explain things at the appropriate level of understanding. You are very knowledgeable.

- 2) Your top three reasons for purchasing your Annuity Contract and/or Life Insurance Contract and/or Long Term Care Contract:

1. Protect my investment.  
2. Ensure cash flow  
3. Provide for children

- 3) Do you feel as though your children will not only benefit from the planning we have done, but will appreciate it as well? Why or why not?

Yes.

- 4) Do you feel as though you could recommend my work to those you care most about? Why or why not?

Absolutely

- 5) If needed in the future, could I use your name as a client reference should a prospective client inquire references from me.

Yes