

O'Connor & Associates
SURVEY

NAME BARBARA M. ESPOSITO

~ 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:

We enjoyed our experience with O'CONNOR
& ASSOCIATES

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

1. THEY ANSWERED OUR QUESTIONS UNTIL THEY WERE UNDERSTOOD BY US.
2. DEVELOPE AN INCOME WITH 100% TAX DOLLARS.
3. ANXIOUS TO COMPLETE OUR INVESTMENT.

ENJOYED YOUR SEMINAR.

- 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?

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

ABSOLUTELY. I ALREADY HAVE 3 IN MIND.

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

YES, WOULD BE HAPPY TO HELP YOU.