

O'Connor & Associates  
SURVEY

NAME BOB & MARY SYMONS

~ 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 INFORMATIVE & PERSONAL

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

NEED BETTER RETURN THEN STOCK MARKET - MORE INCOME  
GUARANTEED INCOME WHILE SICK - DOUBLE NORMAL PAYOUT.  
HOPEFULLY STOP PAYING TAX ON INCOME INTEREST

- 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?

I FEEL THEY WILL APPRECIATE IT IF THE WIFE & I DO NOT DRAW FROMS IT  
AND IT CONTINUES TO DRAW GROWTH. WHY - ANYTIME YOU GET FREE OR  
INHERITED MONEY IS ALWAYS GREAT.

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

YES - ANY TIME A FAMILY CAN BENEFIT AND HAVE A SECURE FINANCIAL  
GROWTH AND MORE SECURE THEN THE STOCK MARKET IS PEACE OF 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.