

O'Connor & Associates
SURVEY

NAME Bonny Taylor

~ 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:

You were very helpful. I had no idea what to do with my 401K.

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

To move my 401K.
To keep my money FOR the future.

- 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. I feel our son will appreciate it later.

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

Yes. I like working with ~~you~~ you. you were very helpful

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

Yes