

O'Connor & Associates  
SURVEY

NAME BRUNO J. FILIPOWICZ JR

~ 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 SATISFIED

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

TO NEVER LOSE WHAT YOU PUT IN  
THE INCOME FOR WHAT YOU PUT IN  
AND THAT YOU CAN SEE WHAT YOU'RE GETTING NOW AND LATER

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?

THEY CAN GET IT ONE WAY  
OR IN PAYMENTS  
THEY DON'T HAVE TO GO TO PROBATE

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

YES  
BECAUSE YOU EXPLAIN EVERYTHING IN DETAIL

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

YES