

O'Connor & Associates
SURVEY

NAME Byron + Jeri Willhoite

~ 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 have been very happy with our
experience to date.

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

1. To move some of ~~my~~ ^{our} retirement income to
a less volatile investment.
2. Have access to proceeds as needed but don't plan
on this for a few more years.
3. Income.

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?

N/A no kids

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

To date we are very happy and would
certainly recommend your firm.

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

certainly