

O'Connor & Associates
SURVEY

NAME CORINNE JEMBRZYCKI

~ 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:

I WAS VERY PLEASED WITH MY VISIT TO YOUR OFFICE. I HAD A PALTRY SUM OF \$19,000 LANGUISHING IN A CD AT BANK OF AMERICA. YOU MADE ME FEEL AS IF I WAS COMING TO YOU WITH A BERNIE MADOFF-LIKE AMOUNT OF MONEY TO INVEST. YOU GAVE ME A LOT OF TIME FOR MY SMALL SUM. YOU MADE ME FEEL I AM AN IMPORTANT CLIENT

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

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 DO NOT HAVE CHILDREN

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

I RECOMMEND YOU ANY CHANCE I GET AS I BELIEVE YOU TO BE KNOWLEDGEABLE, STRAIGHT-FORWARD AND HONEST. NOW THAT THE WINTER IS ON ITS WAY OUT I WILL BE GETTING OUT ONCE AGAIN TO SENIOR EVENTS. THIS IS PRIMARILY WHERE I CAN RECOMMEND YOUR SERVICE.

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

YOU CAN DEFINITELY USE MY NAME AS A CLIENT REFERENCE.

