

The Stearns Agency SURVEY

NAME DAVID + ADRIANNE FREDERICK

~ 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:

EXCELLENT

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

SAFETY

GROWTH

DIVERSIFICATION

- 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'LL DO FINE ON THEIR OWN. IF WE LEAVE ANYTHING IT WILL BE A BONUS. I certainly hope we can bequeath assets to my son in much the way my mother did for me. Without her legacy we would have no annuity!

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

YES - THOROUGH AND SIMPLE EXPLANATIONS

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

YES