

O'Connor & Associates
SURVEY

NAME EMMETT BROGAN

~ 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:

SO FAR SO GOOD. I LIKE THE FACT THAT YOU WERE INTERESTED
IN OUR WELL BEING AND ANNUAL REVIEWS.

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

GROWTH, SAFETY, GENERATIONAL IRA

- 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?

THIS IS MONEY THAT WILL BE PASSED ON TO OUR HEIRS. (IT IS NOT
LIKELY THAT WE WOULD NEED THIS MONEY EXCEPT FOR R.M.D.
IF NOT AVAILABLE FROM OTHER SOURCES.

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

YES. THEY ~~WILL~~ WILL LET ME KNOW WHEN THEY FEEL THE TIME
IS RIGHT FOR THEM.

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

YES