



**SURVEY**

NAME

*Joyce Schuster*

~ Thank you for your time in completing this 5 - question survey. This will only take 10 minutes.  
Please return it 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've truly enjoyed myself so far. Switching my account to your firm was a big decision for me to make. You both have made me feel very welcomed.*

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

- ① I feel I've wasted the last 10 years at Ameriprise*
- ② I need Guaranteed Returns*
- ③ The piece of mind that hopefully I'll never run out of money.*

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?

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

*Yes I do. I got my sister to come hear your seminar. I also sent my cousin Joe Rudzinski some of your information. If she calls, she calls. I'm not pressuring anybody.*

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

*Yes - I would be happy to do this.*

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