



O'Connor & Associates

SURVEY

NAME Karen & James Oliver

~ 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:

- 1 Very pleasant and informative.
- 2 Explained the reasons for moving our investments to equity investments.
- 3 Explained everything in layman's terms.

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

- 1 To stop losing fund from our retirement
- 2 To move ~~our~~ investments to a safer guaranteed investment
- 3 Nations Economy.

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?

- 1 Yes I do feel they benefit, they shouldn't have to feel they need to take care of their parents.

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

- 1 Yes, I talked to my brother + sister in law, about our changes and how much better Jim + I feel about our retirement investments.

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

- 1 Yes