



O'Connor & Associates

SURVEY

NAME KEVIN BOHR

~ 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:

A REVELATION ABOUT STANDARD POLICIES
AND THE ALTERNATIVES YOU PROPOSED.

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

FINANCIAL GROWTH
FINANCIAL SECURITY
EASY ACCESS

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 HAVE NO CHILDREN OF MY OWN

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

YES. I HAVE PASSED YOUR CARD TO
OTHERS I WORK WITH.

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

NO DOUBT ABOUT IT

