

O'Connor & Associates
SURVEY

NAME LARRY MORELAND

~ 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:

VERY POSITIVE EXPERIENCE. JOHN WAS NOT PUSHY, AND
PATIENT WITH ME. ALWAYS EXPLAINED ANSWERS TO
MY QUESTIONS. (SOMETIMES MORE THAN ONCE).

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

SECURITY OF INVESTMENT
GUARANTEED INCOME
10% BONUS

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?

YES. THE DEATH BENEFIT ENSURES THEY WILL NOT
LOSE ANYTHING

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

YES. I THINK IT IS A SAFE CONSERVATIVE INVESTMENT.

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

YES