



O'Connor & Associates

SURVEY

NAME Leona Rae Jones

~ 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:

John and Roe took time to explain the intricacies
of this process. We are so appreciative of their
patience.

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

- Need to invest inherited money in a "safer" vehicle.
- Retirement income
- Need a manager of my funds.

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?

In the long term, they will appreciate that we
kept our money/investments tidy.

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

Yes! The seminars are well done, and geared to
our age-group.

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

If you deliver all you suggest through the years,
of course!