

O'Connor & Associates  
SURVEY

NAME

Linda Barber

~ 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 was very quick to respond to my call. His name was given to me by one of his clients & he had no idea who I was.

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

- ① To protect the money we have
- ② safety
- ③ to move from what we have been doing

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?

Not sure they will benefit but may learn from our experience.

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

yes I would recommend that they should talk to John.

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

yes