

O'Connor & Associates SURVEY

NAME Luba Tacharkiewicz

~ 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:

we find your office staff to be very pleasant. Overall,
our experience has been positive and informative

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

1) so we won't lose money
2) financial security
3) financial growth

- 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, I feel my children my benefit, although uncertain
at this time if it will be appreciated.

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

yes.

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

yes.