

O'Connor & Associates
SURVEY

NAME Margaret A. Brod

~ 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 pleasant experience, as well as informative

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

Avoid taxes if possible
A reasonably high rate of interest, while keeping principal safe
Preservation of capital

- 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 think my children should appreciate the time + effort I have taken to preserve capital, to maximize whatever I can leave to them, + to simplify my estate, so as to give them the fewest problems in settling it.

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

Yes - because you have taken the time to explain investment products to me, more than once if necessary.

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

Yes - after I have received my paperwork + have had a chance to observe performance of investment.