

O'Connor & Associates
SURVEY

NAME MARJORIE A. PITT

~ 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.

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

As you know there was a time frame on that one annuity

- 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 feel they will benefit from the planning, but not certain how they will feel about paying the taxes involved.

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

Yes. Your presentation is very professional & explanations clear & concise. Also appreciate that you do return calls, & appointments are met as promised.

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

Absolutely