

O'Connor & Associates
SURVEY

NAME Mark R. Jackymiak

~ 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, you have been prompt in returning calls and most times accessible on the first attempt to contact you. I appreciate your working with my business and outside activity schedule and have been very accomodating in rescheduling meetings in the comfort of my own home.

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

- ① More Growth
- ② More Income
- ③ Safety

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?

N/R

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

Yes. In these economic times I believe an overwhelming majority of middle class people are in need of and searching for an investment option that provides the ten reasons you outlined in the attachment with this survey to research and evaluate an annuity for a more comfortable building block for retirement.

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

Yes. Please feel free to do so.