

O'Connor & Associates
SURVEY

NAME Martin R. Adams

~ 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:

Was very easy to talk about what I wanted, and what you had to offer

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

① Tired of losing money in 401k

② I needed something lock into so I wouldn't keep going down with the market

③ Also needed something with long term output

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 the people involved with my investment will get more out of it this way

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

I feel I would recommend your work to people, only if they are really interested

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

Yes could use my name as a reference. I would be glade to tell them about my experience so far with your company