

O'Connor & Associates
SURVEY

NAME MIKE & ELAINE BENNETT

~ 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

FANTASTIC! YOU ARE VERY HELPFUL & IT'S A SECURE FEELING TO HAVE YOU AS OUR CONSULTANT - YOU OFFER VALUABLE INFORMATION & IT'S NICE TO KNOW HOW YOU CAN INVEST OUR MONEY WITH GOOD RESULTS - AND YOUR STAFF IS VERY QUALIFIED & CARING. AND YOU'RE FUN TO BE WITH ☺

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

- IT'S SAFE
- IT HAS A GOOD RATE OF RETURN.
- WE ARE GLAD YOU HAVE EXPERIENCE WITH IT.
- TAX BENEFITS
- MONTHLY INCOME IF WE CHOOSE.

- 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?

ABSOLUTELY! (IF WE DON'T NEED TO ACCESS IT BEFORE THAT). OTHERWISE WE DON'T EVEN HAVE A WILL MADE YET. MAYBE ONE OF THE ATTORNEYS THAT WORK WITH YOU COULD HELP US OUT WITH THAT, TOO! ☺

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

WE CAN & WE WILL! ☺

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

YOU MOST CERTAINLY CAN!

THANK YOU FOR THE WORKSHOP & YOUR AVAILABILITY TO MEET WITH US & SET UP OUR INVESTMENT. ☺