

O'Connor & Associates  
SURVEY

NAME NEIL NUNAMAKER

~ 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:

Friendly, informative, easy to talk to, good soft sell

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

Preservation of capital  
Provide proceeds for me & beneficiaries  
Another income stream

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 know they will benefit and they damn well  
better appreciate it. I know they will because  
they worry that their generation will not live as  
well as my generation.

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

Yes. Because you wouldn't embarrass me by  
going to a friend or family members home &  
pitch a hard sell + scare the hell out of them.

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

Yes