

O'Connor & Associates
SURVEY

NAME Phil O'Callrich

~ 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 GOOD EXPERIENCE SO FAR. YOU SEEM TO KNOW YOUR PRODUCTS AND PRESENT THEM IN A FORMAT THAT IS EASILY UNDERSTOOD. YOU SEEM TO TREAT CLIENTS LIKE YOU ARE GENUINELY CONCERNED FOR THEIR FINANCIAL WELL BEING.

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

1. SECURITY OF PRINCIPAL
2. GUARANTEED RATE OF RETURN
3. 10% BONUS

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?

Yes, Due to PROTECTION OF PRINCIPAL.

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

Yes - TAKES THE WORRY OUT OF RETIREMENT INVESTING

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

I WILL BE HAPPY TO BE A CLIENT REFERENCE