

O'Connor & Associates  
SURVEY

NAME Groberski, Phyllis

~ 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 Knowledgeable
- willing to help me maintain a comfortable life style
- Promptness in returning phone calls
- friendly atmosphere
- explanations were understandable to one who is not an expert in these matters

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

- to increase my portfolio instead of losing money
- it was time for me to make changes due to our economy
- taking a chance with a new group can hopefully be of a very beneficial relationship

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 - Because people are not saving as much due to the economy slump, so my accounts hopefully will be a little nest egg for them for their future.

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

yes - but you have to be careful with your suggestions, as people are leery about discussing their financial situations

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

yes