



O'Connor & Associates

SURVEY

NAME Robert & Mary Paulson

~ 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 happy with the way we've been treated. Answered
all of our questions and concerns in layman terms.

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

① Guaranteed Return ② More Growth ③ Safety

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 - It avoids probate & administrative costs.
also - May provide some income at the end of our life.

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

yes - Trustworthy -

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

yes - I would share my experience with
them -
Thank you Mary Paulson