

O'Connor & Associates
SURVEY

NAME

Rosemarie Coogan

~ 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 pleasant. Not pushy. Reassuring

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

Switched from one to another getting a better rate.

- 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'm not too concerned about my children benefiting from my planning. They are adults capable of taking care of themselves.

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

Yes. Advice was good and could benefit others.

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

Not at this time.