

O'Connor & Associates SURVEY

NAME SYLVIA MATCZAK

~ 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:

FOUND THE EXPERIENCE TO BE PROFESSIONAL + QUESTIONS WERE
IN AN UNDERSTANDING MANNER - LEFT ME WITH A POSITIVE
FEELING -

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

TO COMBINE THE IRA'S INTO ONE POLICY -
TO RECEIVE A HIGHER INTEREST
MORE INCOME

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?

MY SISTERS AND BROTHERS, NEPHEWS AND NIECES WILL CERTAINLY
APPRECIATE THE BENEFIT FROM THE PLANNING.

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

YES, I COULD/WOULD RECOMMEND YOUR WORK - FELT I HAD DONE
THE BEST FOR MYSELF - AFTER THE MEETING - SATISFIED -

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

YES -