

O'Connor & Associates  
SURVEY

NAME TOM & IRENE VALACAK

~ 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:

We've enjoyed dealing with you and Dana on a one on one basis. We've now better able to understand our financial position in regard to the financial direction your seminar dealt with.

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

Guaranteed returns.  
Safety and growth.  
A stop-gap on losses when the market drops.

- 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?

Our children will benefit due to the fact we now have a stop gap on future losses.

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

Irene - yes - what won me over to what you were telling us was when you told Tom he was doing fine with the bulk of his investments & you did not feel the need to do anything else with them.

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

Yes