



O'Connor & Associates

**SURVEY**

NAME Tom VanderMolen

~ 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:

PROFESSIONAL AND PLEASANT  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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

FUTURE INCOME  
Reduce TAX ON SOCIAL SECURITY INCOME  
GUARANTEED RETURN  
\_\_\_\_\_  
\_\_\_\_\_

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, my children will appreciate it, I will  
hope to make their future better.  
\_\_\_\_\_  
\_\_\_\_\_

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

yes, I would recommend your work because  
of your willingness to help and transparency  
\_\_\_\_\_  
\_\_\_\_\_

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

yes  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_