

O'Connor & Associates
SURVEY

NAME GERALD + MICHELLE JEROPKE

~ 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 HAVE ^{FOUND} YOU TO BE INFORMATIVE. YOU HAVE KEPT US
UP TO DATE ON WHAT IS HAPPENING WITH OUR INVESTMENTS. YOU AND
YOUR STAFF HAVE BEEN PERSONAL AND WILLING TO HELP US WHEN
EVER POSSIBLE. WE LOOK FUTURE TO WORKING WITH YOU IN THE
FUTURE.

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

1) MORE SECURE INVESTMENT, WITH GROWTH.
2) 10% BONUS FOR NEW CONTRACT
3) OVERALL THIS ANNUITY SEEMS A BETTER FIT FOR US AT OUR
AGE AND FINANCIAL SITUATION.

- 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?

WE DO NOT HAVE CHILDREN.

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

YES WE COULD AND WOULD RECOMMEND YOU. AS MOST PEOPLE
AND RELATIVES WE HAVE ARE AGING, THIS ANNUITY WOULD BE
HELPFUL FOR THEM.

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

YOU CAN USE US AS A REFERENCE IF NEEDED.