

O'Connor & Associates
SURVEY

NAME Michael & Nancy EHLINGER

~ 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're very pleased with John. His explanation of the accounts and how we can earn money instead of losing it so fast like we were.

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

① To EARN MONEY INSTEAD of losing it
② To be able to use it as a supplement when retired.

- 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 benefit and if we die they can continue the annuity.

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

Yes. With the economy ~~with~~ the way it is, so many of us middle class are losing money in the stock market faster than we can save - especially being one of the baby boomers

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

Yes.