

# CLIENT SURVEY

Date: \_\_\_\_\_ Recruit: \_\_\_\_\_ Trainer: \_\_\_\_\_

PRIMARY NAME \_\_\_\_\_ CONTACT NUMBER \_\_\_\_\_ EMAIL \_\_\_\_\_

SPOUSE NAME \_\_\_\_\_ CONTACT NUMBER \_\_\_\_\_ EMAIL \_\_\_\_\_

## 6 REASONS WE ARE HERE

1. Training \_\_\_\_\_ (Learning the System)
2. We Are Expanding and Looking For New Business/Franchise Owners – RVP average income \$115k year
3. We Are Expanding and Looking For New Part-time Representatives – \$25 to 50k year while learning the systems
4. We Are Expanding and Looking For New Silent Partners – get license & just refer people, \$5 – 10k year
5. Referrals -----People you know who need or could benefit from our services
6. Earn your business as a client

## CURRENT CAREER

PRIMARY

SPOUSE

Where do you work now? (name of place) \_\_\_\_\_

What do you do for them? (mailperson, teacher, ...) \_\_\_\_\_

What do you like about your current career? \_\_\_\_\_

What do you dislike? \_\_\_\_\_

Are they paying you what you believe you are worth? Yes or No

If no, how much more monthly? \$ \_\_\_\_\_

When will your current job pay you that? 1yr, 3, 5, 10, never

Is that okay with you? Yes, No, Not really

(If no or not really) What are your options? \_\_\_\_\_

Have you ever thought about your own business as an option? Yes or No

(If yes), why haven't you started the business? \_\_\_\_\_

(If no), why haven't you looked at that as an option? \_\_\_\_\_

What do you think it costs on average to start a business \$ \_\_\_\_\_

Would you own a McDonald's Franchise?/Walmart? Yes or No

If you could earn an extra \$25 to \$50k a year, working on the average of 8 to 10 hours a week, part-time, would that interest you? Pr - Yes, No, Not really Sp - Yes, No, Not really

## WHAT'S MOST IMPORTANT IN YOUR LIFE?

Pr - Work \_\_\_\_\_ Spiritual Life \_\_\_\_\_ Family \_\_\_\_\_ Sp - Work \_\_\_\_\_ Spiritual Life \_\_\_\_\_ Family \_\_\_\_\_

Is it unimportant, important, very important to provide financial security for your family? Pr \_\_\_\_\_ Sp \_\_\_\_\_

Is being debt free important to you? Yes, No, Not really

When is your current debt free date? Year \_\_\_\_\_ Don't know

Is having a secure retirement important to you? Yes, No, Not really

What age are you on track to retire at? \_\_\_\_\_

What would your ideal retirement age be? \_\_\_\_\_

When you die do you want your family: Fully or Partially taken care of, Struggling or Broke? Pr \_\_\_\_\_ Sp \_\_\_\_\_

If you died right now which would they be? Pr \_\_\_\_\_ Sp \_\_\_\_\_ Are you ok with that? Pr - Y / N Sp - Y / N

If you could save \$4 - 500 a year on **Auto & Home Insurance**, would you want a free quote? Pr - Y / N Sp - Y / N

Would a **SMART Home Protection System** interest you? (see kids while out) Pr - Y / N Sp - Y / N

Do you have a WILL? Yes or No Pr - Y / N Sp - Y / N

Do you understand why you need it? (Explain to them why they need it.) Pr - Y / N Sp - Y / N

Would you like to empower your family (children to age 26) with access to an attorney

24/7 if they get stopped by police and a **Complimentary Will**? Pr - Y / N Sp - Y / N

Wouldn't you agree that there is a right way and a wrong way to handling your finances? Pr - Y / N Sp - Y / N

What concerns you most: Living too long or Dying too soon? Pr \_\_\_\_\_ Sp \_\_\_\_\_

Dying to soon? Why? Pr \_\_\_\_\_ Sp \_\_\_\_\_ Living to long? Why? Pr \_\_\_\_\_ Sp \_\_\_\_\_

What have you put in place in case you die to soon? (Face Amts) Pr \$ \_\_\_\_\_ Sp \$ \_\_\_\_\_ MO Premiums \$ \_\_\_\_\_

What kind? (Whole life, Term) Why did you purchase this Face Amt? How much do you believe you need? Pr \$ \_\_\_\_\_ Sp \$ \_\_\_\_\_

Let's see how much you need (DO DIME & EXPLAIN PIN NUMBER TO THEM and let them know they are Grossly under insured).

YOU NEED \$ \_\_\_\_\_ BUT YOU ONLY HAVE \$ \_\_\_\_\_. (Now explain FIN NUMBER in case they live too long)

What have you put in place in case you live to long? (401k, tsp, 403b, Pension, IRA, deferred comp, social security, etc)

PR ( type of retirement plans) \_\_\_\_\_ Sp (type of retirement plans) \_\_\_\_\_ Show them how to figure

their FIN NUMBER. ( GO TO FIN WORK SHEET), THIS IS THE TOTAL AMOUNT OF MONEY YOU NEED TO ACCUMULATE IN

YOUR RETIREMENT PLANS IN CASE YOU LIVE TOO LONG PR \$ \_\_\_\_\_ Sp \$ \_\_\_\_\_

Now DO THE DIME SHEET AND EXPLAIN THEIR PIN NUMBER TO THEM, IN CASE THEY DIE TOO SOON.

How often do you get paid? wkly, bi-wkly, bi-monthly, monthly

How much can you comfortably afford to set aside \_\_\_\_\_ to achieve **Financial Independence** for your family? \$ \_\_\_\_\_

Do Quote Today