

CLIENT SURVEY

Date: _____ Recruit: _____ Trainer: _____

PRIMARY NAME _____ CELL NUMBER _____ EMAIL _____

SPOUSE NAME _____ CELL 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 \$125k 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 and make \$10 – 15k 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	Yes or No
If no, how much more monthly?	\$ _____	\$ _____
When will your current job pay you that?	1yr, 3, 5, 10, never	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		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? Yes, NO, Not Really Pr - _____ Sp - _____

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 Yes No Not really

When is your current debt free date? Mortgage pd off Year _____ Don't know Year _____ Don't know

Is having a secure retirement important to you? Yes No Not really 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 \$400- \$500 a year on **Auto & Home Insurance**, would you want a free quote? Pr - Y / N Sp - Y / N

If we could save you or your love ones \$300 to \$400 a year on your/their **Medicare** would you/They 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 get a **Complimentary Will**? Pr - Y / N Sp - Y / N

Would an **ID Theft** program interest you? (Peoples identity are being stolen everyday) 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 - _____ Sp - _____

Do Quote
Today

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 Amt) 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)
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 you & your family?
\$ _____

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) _____
What's your FIN #? _____ THIS IS THE TOTAL AMOUNT OF MONEY YOU NEED TO ACCUMULATE IN YOUR RETIREMENT PLANS SO YOU DON'T RUN OUT OF MONEY DURING RETIREMENT. (GO TO FIN WORK SHEET) -Show them how to figure their FIN NUMBER. , 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 you & your family?
\$ _____