

## Client Survey

3 Reasons Why We Are Here Tonight:

1. Referral Base

2. Earn your business as clients

3. Expanding & Need Help

Do you have someone right now who handles your current financial needs other than yourselves? Yes No  
(If yes, are they open to make a change if we are able to improve and enhance their current situation?)

First Names

Last Name

Client

Spouse

Current careers?

\_\_\_\_\_

What do you like about your current career?

\_\_\_\_\_

What Would You Change About it?

\_\_\_\_\_

If you could choose your annual income, what would it be? \$ \_\_\_\_\_ / yr.

What are some things that you and your family would do differently if time and money were no issue?  
For example: What's important to you? What do you dream about? What's Important to you?

GOALS: \_\_\_\_\_

(Homes, Cars, Travel, Charities, Hobbies, Toys, Education, ect....)

When will your current career allow you to accomplish those things? \_\_\_\_\_

If we can show you a way to help you reach your goals that would give you more money, security and freedom than your current career, would you be open to exploring that option? Y N

What age are you on track for to be able to retire? \_\_\_\_\_ What is your ideal retirement age? \_\_\_\_\_  
If we can put together a plan to hit that goal, would you follow it? Y N

Why I decided to get involved with Primerica.

(2 minutes or less)

As I go through my presentation I want you to ask yourself 3 questions:

1. Is Primerica a credible company?

2. Is what Primerica does for families' life changing?

3. Who do you know that would benefit from meeting with us? -**Maybe this will help:**

Will you play a little game with me?

Who can you think of right now (first names only) that is Married- Has kids- and a Homeowner?

Also, who comes to your mind first when I say:

Best Salesperson that's not pushy- Best Teacher- Most Enthusiastic- Most Ambitious- Most Motivated

(Look down at the referral sheet and start writing names as they say them, ask for as many as they can think of then start your presentation)

