

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)

