

LIFE GOALS. DONE.



Insurance Awareness Survey

1. Do you think Insurance is important for your life - Yes () No ()
2. Do you have life Insurance Policy – Yes () No ()
3. Who has Influenced you to buy an Insurance policy—
a. Media b. Agent c. Friends, Family, Relatives, Colleagues d. Others_____
4. From whom you have purchased your Insurance Policy—
a. Friend b. Family/Relative c. Colleague d. Online e. Own Agent
5. Do you know the earning of your Agent and No. of Foreign Trips he/she Qualified- Yes / No
6. Do you feel it is important to plan for your important life goals — Yes () No ()
7. How do you rate yourself for the financial planning preparedness for life goals on the scale of 1 to 5 (1 being lowest & 5 being highest) - Rating (1) (2) (3) (4) (5)
8. Which is your preferred investment option—
a. Real Estate b. Gold/silver c. MF/SIP d. ULIP
9. Do you feel professional advice helps in accomplishing individual life goals – yes () No ()
10. Do you feel additional second income is required to accomplish your life goals – Yes / No

Name- _____

Phone No-_____

References—

1. Name_____ Ph. No-_____

2. Name_____ Ph. No-_____

3. Name_____ Ph. No-_____

Name of Manager_____