New Agent Intake

What is your relationship status?

Married / Relationship *Single*

Do you have any children? If so, how many?_____

Boy / Girl Age: *Boy / Girl Age:* *Boy / Girl Age:* *Boy / Girl Age:* *Boy / Girl Age:*

What is the main goal that you want to achieve in the business within the next 3 months?

_____

Do you see yourself making a career out of the business as a personal producer or as an agency builder?

Personal Producer *Agency Builder*

When it comes to your goals, what is your "Why" that drives you?

Family *God / Religious Beliefs* *Ideology* *Recognition* *To prove something to someone or yourself*

Financial Inventory

If you passed away today, do you have any personal life insurance policies, significant savings, or investments like stocks, bonds, or a 401K that your loved ones can use to cover funeral expenses or to replace your income?

No coverage *Personal Life Insurance (Outside of Work)* *Annuity* *401K* *Stocks* *Bonds* *Roth* *Other*

If you passed away today, what is the name and relation of the person that this would have the biggest financial impact on when it comes to paying for your funeral costs or the bills?

*Name*_____ *Relation*_____

Are they financially able to cover the funeral expenses and the bills on their own, or would they need some kind of assistance?

Yes *No, they would need assistance with all or part of the expenses.*

Do you rent or own a home? *Rent* *Home Owner*