



Clients Name _____

Client Initial Satisfaction Survey

My senior advisor was courteous and very friendly.
Disagree[] Somewhat agree[] Strongly Agree[]

My senior advisor was knowledgeable and very professional.
Disagree[] Somewhat agree[] Strongly Agree[]

My senior advisor explained thoroughly all my rights and options.
Disagree[] Somewhat agree[] Strongly Agree[]

How satisfied are you with the explanation of the features and benefits of your life insurance program.
Not satisfied[] Somewhat satisfied[] Very satisfied[]

I feel the life insurance program I am applying for fits my needs and budget.
Disagree[] Somewhat agree[] Strongly Agree[]

Based on your overall experience today how likely would you be to recommend your senior advisor to friends and family.
Would not recommend[] Maybe recommend[] Definitely recommend[]

Who would you recommend first?

Name City Phone number

Name City Phone number

Name City Phone number

Name City Phone number

