

SELF GENERATED INTEREST QUESTIONNAIRE



DO YOU HAVE/ KNOW:

A Spouse/ Partner?

Siblings?

Parents?

In-laws?

Extended Family Members?

Children?

Co-workers?

A successful business owner?

Business partners?

Best friend?

Mentor/ advisor?

Home owners?

Families in your neighborhood?

Someone with extra income?

Someone interested in part-time work?

A non-Equis life insurance agent?

Fill in these questions with any names that apply. Note: this is not a guaranteed sale or agent acquisition. However, these are names that may be interested in purchasing insurance or hearing about the opportunity.

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DO YOU HAVE/ KNOW:

Fellow religious organization members? (I.E. church, temple, mosque, etc)

Recreational/social group members?

Chamber of commerce members?

Networking groups?

Someone interested in changing fields?

Someone in charity work?

Someone that is looking for flexible hours?

Someone that has debt? (I.E. student loans, credit card, mortgage, etc)

Significant other's co-workers?

Significant other's family?

Significant other's friends?

Military personnel? (former or active)

PTO/PTA members?

Real estate agents?

Travel Agents?

Small business owners?

Fill in these questions with any names that apply. Note: this is not a guaranteed sale or agent acquisition. However, these are names that may be interested in purchasing insurance or hearing about the opportunity.

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DO YOU HAVE/ KNOW:

Local merchants you frequent?

Hairdresser/ Barber/ Cosmetologist?

Someone you send Holiday Cards to?

Facebook Friends?

LinkedIn Connections?

Former co-workers?

Out of state friends/ family?

Someone that is looking to become a business owner?

Doordash/ Uber/ Lyft drivers?

Someone in Network Marketing?

Someone selling products like Lularoe, Avon, Mary Kay?

Someone involved with their local community?

Someone that does local fundraising?

Someone in the arts? (I.E. artists, musicians, actors, etc)

Roommates?

Former colleagues/ co-workers?

Fill in these questions with any names that apply. Note: this is not a guaranteed sale or agent aquisition. However, these are names that may be interested in purchasing insurance or hearing about the opportunity.

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One you have completed the above questionnaire: Sort all of the names into the buckets below. Some names may only go into one bucket, but others may go into both.

POTENTIAL CLIENTS

POTENTIAL AGENTS

Note: this is not a guaranteed sale or agent acquisition. However, these are names that may be interested in purchasing insurance or hearing about the opportunity.