

Senior Financial Planning Survey:

Name: _____

Address: _____

City/State: _____

Number in Household: _____

Single Income (Y/N): _____

How long in area: _____

1. Is there a primary breadwinner in the home? _____
2. Do you consider yourself a planner? _____
3. Do you currently own cemetery property? _____
4. Do you currently have life insurance? _____
5. Do you feel you can leave your family too much life insurance? _____
6. Do you feel the purchase of Life Insurance to be a wise choice or a waste of money? _____

7. If you were going to purchase a financial product, such as Life Insurance, an Annuity, or Investments, would you prefer to purchase those over the phone, the internet, or face to face? _____

8. If you were to pass away today, how confident are you that your family would have the Final Expense and Burial Funds available with 2-3 days of your passing? _____

9. Are you concerned that your final arrangements might create a financial burden on your friends and family? _____

10. What is your favorite color? _____

Thank You for Your Time!