



# MARKET SURVEY

building a preferred clientele  
through understanding

Potential Representative \_\_\_\_\_ Date Completed \_\_\_\_\_

Name \_\_\_\_\_ Age \_\_\_\_\_ Occupation \_\_\_\_\_

Spouse \_\_\_\_\_ Age \_\_\_\_\_ Occupation \_\_\_\_\_

Children/Ages \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone Number \_\_\_\_\_ Best time to call \_\_\_\_\_

Cell Number \_\_\_\_\_ Email \_\_\_\_\_

I'm considering starting a business as a financial representative with Modern Woodmen of America, a fraternal financial services organization. Knowing me as you do, how do you feel about this decision? \_\_\_\_\_

Are you currently working with a financial services professional who meets with you on a regular basis? Y or N  
How do you feel about this? \_\_\_\_\_

If I decide to enter this business, would you have any objections to reviewing your financial goals with me sometime in the future? \_\_\_\_\_

(complete reverse side of this form)

**As I begin building a quality clientele, who are five people I should meet? People you know, that I don't.**

**1. Name:** \_\_\_\_\_ Age: \_\_\_\_\_ Relationship to You: \_\_\_\_\_  
Spouse: \_\_\_\_\_ Age: \_\_\_\_\_ Occupations: \_\_\_\_\_  
Children: \_\_\_\_\_ Ages: \_\_\_\_\_ Hobbies/Interests: \_\_\_\_\_  
Address: \_\_\_\_\_ Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_  
Best Time: \_\_\_\_\_ Email Address: \_\_\_\_\_

**2. Name:** \_\_\_\_\_ Age: \_\_\_\_\_ Relationship to You: \_\_\_\_\_  
Spouse: \_\_\_\_\_ Age: \_\_\_\_\_ Occupations: \_\_\_\_\_  
Children: \_\_\_\_\_ Ages: \_\_\_\_\_ Hobbies/Interests: \_\_\_\_\_  
Address: \_\_\_\_\_ Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_  
Best Time: \_\_\_\_\_ Email Address: \_\_\_\_\_

**3. Name:** \_\_\_\_\_ Age: \_\_\_\_\_ Relationship to You: \_\_\_\_\_  
Spouse: \_\_\_\_\_ Age: \_\_\_\_\_ Occupations: \_\_\_\_\_  
Children: \_\_\_\_\_ Ages: \_\_\_\_\_ Hobbies/Interests: \_\_\_\_\_  
Address: \_\_\_\_\_ Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_  
Best Time: \_\_\_\_\_ Email Address: \_\_\_\_\_

**4. Name:** \_\_\_\_\_ Age: \_\_\_\_\_ Relationship to You: \_\_\_\_\_  
Spouse: \_\_\_\_\_ Age: \_\_\_\_\_ Occupations: \_\_\_\_\_  
Children: \_\_\_\_\_ Ages: \_\_\_\_\_ Hobbies/Interests: \_\_\_\_\_  
Address: \_\_\_\_\_ Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_  
Best Time: \_\_\_\_\_ Email Address: \_\_\_\_\_

**5. Name:** \_\_\_\_\_ Age: \_\_\_\_\_ Relationship to You: \_\_\_\_\_  
Spouse: \_\_\_\_\_ Age: \_\_\_\_\_ Occupations: \_\_\_\_\_  
Children: \_\_\_\_\_ Ages: \_\_\_\_\_ Hobbies/Interests: \_\_\_\_\_  
Address: \_\_\_\_\_ Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_  
Best Time: \_\_\_\_\_ Email Address: \_\_\_\_\_