



Chad Avery, Regional Sales Manager

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Please Fill in This Form – Upon Receipt We Will Schedule a Zoom Call

Name _____

Address _____

City _____ State _____ Zip _____

Cell Phone Number _____

Email Address _____

Professional Background

1. Current Employment Status – Please Check Box

Employed Unemployed Self-Employed Student

2. Previous Experience in Sales or Insurance (if applicable):

Company Name _____

Position _____

Duration _____

Responsibilities _____

3. Total Years of Sales Experience _____

4. Have you ever worked as a life insurance agent? Yes No

If yes, please provide details _____

Education

1. Highest Level of Education Completed – Please Check Box

High School Some College Bachelor's Degree Other: _____

2. Relevant Certifications or Licenses Obtained and Carry (If applicable)
(e.g., Life Insurance License, Series 6, Series 63)

Skills Assessment

1. Please rate your skills in the following areas (1-5, 5 being the highest):

Communication: _____

Relationship Building: _____

Sales Techniques: _____

Problem Solving: _____

Time Management: _____

2. What specific sales techniques or methodologies are you familiar with? (If applicable)

Motivation and Goals

1. Why are you interested in a career in life insurance sales?

2. What are your short-term and long-term career goals?

3. What motivates you to succeed in sales?

4. Have you worked in 100% commissioned based pay before? (If applicable) Yes No

5. What kind of income would motivate you to succeed?

6. Why are you leaving your current source of employment?

7. Describe your aspirations and goals for your new role in the final expense industry.

Cultural Fit

1. If a client sends you a request, are you willing to travel to them for the sale? Yes No

2. How do you handle rejection or setbacks in sales?

3. What does a “winning culture” mean to you?

Availability

1. Do you realize this is a full-time opportunity and not a hobby? Yes No

2. What is your preferred start date? _____

Upon Completion: Email, Fax or Text this form to:

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After reviewing we will contact you to set up a Zoom call.