

Market analysis

Live your best life.



Transamerica Agency Network's Market Analysis is designed to help you explore and develop your own personal market opportunities, understand the commitment to building enduring relationships, and determine if this is the right career for you. Your efforts in building your own personal market can result in a fast start as you begin your career with Transamerica Agency Network.

Please note: The remainder of the document includes scripts, questions, and areas to fill in the contact's information and answers. This document is to be filled out by you, not the contact.

I'm giving serious consideration to a career with Transamerica Agency Network. Before I make a decision, I would appreciate hearing your thoughts on the financial services industry and what you think of me joining it. Your opinions will be a great help to me in considering this career.

Name: _____

Age: _____

Address: _____

Occupation: _____

Employer: _____

Spouse/Significant Other's Name: _____

Spouse/Significant Other's Age: _____

Spouse/Significant Other's Occupation: _____

Children: _____

Employer: _____

Have you ever spoken with a financial professional about your insurance needs? Yes No

If No: Respond "That's not unusual, a large percentage of the people we visit with have not met with a financial professional", and skip to "What characteristics do you look for in an agent?"

If Yes: When did you last speak to them? _____

What type of professional did you speak with?

Attorney Accountant Lawyer Financial Professional

Other _____

When was the last time you met with your agent? _____

Can you describe your experience? _____

What characteristics do you look for in an agent? _____

What kind of services do you expect from an agent? _____

What kind of relationship would you like to have with an agent? _____

How often do you review your financial situation? _____

Considering all the people you worked with in developing your insurance plan, who most impressed you? _____

Why? _____

People place different values on insurance planning and accumulating wealth. I want to get your opinion on the value of planning for various needs. Please respond to the following by indicating which is a high priority (H), medium priority (M), low priority (L), or not applicable (N/A) for you.

Insurance planning in general?	H	M	L	N/A
Providing funds to help pay off your mortgage?	H	M	L	N/A
Providing funds to help pay debts in the event of your death?	H	M	L	N/A
Saving for your children's education?	H	M	L	N/A
Saving for retirement on a regular basis?	H	M	L	N/A

Is there anything you would like to add which might help my decision to join Transamerica Agency Network as an agent? If, as a result of your help, I decide to join Transamerica Agency Network, would you be willing to meet with me to discuss your insurance planning?

This information and the time you've spent has been a great help and I appreciate it. I would like to talk to several other people to get their opinion. If you were in my position, who would you call to help you make this decision?

Name: _____

Address: _____

Phone: _____

Occupation: _____

Marital status: _____

Dependants: _____

Name: _____

Address: _____

Phone: _____

Occupation: _____

Marital status: _____

Dependants: _____

Name: _____

Address: _____

Phone: _____

Occupation: _____

Marital status: _____

Dependants: _____

Name: _____

Address: _____

Phone: _____

Occupation: _____

Marital status: _____

Dependants: _____

Thank you for your time and willingness to help.
Your input has given me a lot to think about. I look forward to seeing you again.

Transamerica Agency Network, Inc. is a licensed insurance agency with Transamerica Life Insurance Company and affiliated Transamerica companies offering insurance and financial products.

