

Date: _____

New Agent Candidate Questionnaire

Please complete the questionnaire and return it to UIG within two (2) business days. A representative of UIG will contact you after we carefully review your questionnaire.

E-mail: uigrecruiting@uiginc.com | Fax: 224-993-5273 | Phone: 800-551-0080 Ext 4502

Name: _____

Address: _____

City / County: _____

State/Zip: _____

Resident License: YES NO

Phone: _____ Cell/ Home/ Work

Email: _____

How long have you been Life insurance licensed? _____ Health licensed? _____

Do you currently have E/O insurance? YES / NO If yes, date it expires _____

Are you AHIP certified? _____ AML certified? _____

What carriers are you currently appointed with? _____

(If any of UIG carriers) "When did you last write business?" _____

Is there anything in your past that would prevent you from getting appointed with UIG carriers? _____

On a scale from 1 to 10, rate your satisfaction with what you are doing currently: _____

What has been your best year in insurance and when was that? \$ _____

How many applications did you write last year? _____ Your best month? _____

Would you provide documentation of income/Production over the last 3 years?? _____

How are you generating leads currently and how much do you spend per month? _____

How many appointments are you setting on average each week? _____

What is your mix of new business?

- Medicare Advantage _____%
- Medicare Supplement _____%
- Life/Final Expense _____%
- Annuities _____%
- LTCI _____%
- Ancillary health _____%
- Other: _____%
- Total** **100%**

Is there anything that would prevent you from going to work immediately and running 15 or more appointments a week if you were given the opportunity? _____

Are you willing /able to travel beyond a 30 mile radius for appointments? _____

Would you book 7 appts on leads we provide you within 1 week of graduation from our Initial Training Course (ITC)?

Would you be willing to continue to book 10 appointments a week in addition to the Preset appointments we provide you?

What are your income expectations? \$ _____