



SURVEY FORM

Personal Details:

Name: _____

Date of Birth/Age: _____ Occupation: _____ Education _____

Your Monthly Income _____ Your Monthly Family Expenses _____

Mobile No: _____ E-mail : _____

Survey Questions:

1. Do you have any LIC Policy? Yes/ No.
2. If No, please give specific reason for not taking any LIC policy:
 - a) No agent has approached
 - b) Don't believe in life Insurance
 - c) Not Insurable
 - d) Can't afford the premium
 - e) Any other reason _____
3. If Yes, Please reply to following questions to help us serve you better:
 - i) No. of Policies: _____ Sum Assured: _____ Annual premium: _____
 - ii) What prompted you to buy above policies?
 - a) Suggested by relative/ friend.
 - b) Just to oblige the agent/ Bank Manager.
 - c) Advertisement.
 - d) Advised by Tax consultant/CA.
 - e) Need analysis done by the agent.
 - f) Any other reason _____
 - iii) How do you pay your Premiums?
 - a) Collected by Agent
 - b) Through ECS/ Salary
 - c) Through online
 - d) By Self at LIC office/ Collection Centre.
 - iv) Do you require any of the services given below under your policies? Yes/ No.
Age admission / Change of address / Nomination / Assignment / Reassignment / Revivals / Survival Benefit / Maturity / Death Claim / Alterations in mode etc.
 - v) How do you rate services of your Agent? Poor/ Good/ Very Good/ Excellent.
4. Do you know anyone who has not received his Maturity Claim in time from LIC? Yes/No.
5. Do you know anyone who's Death Claim is Pending with LIC? Yes/No.
6. When were you last approached by an LIC agent for New Policy / Servicing?
 - a) During last six months
 - b) Between six months to one year
 - c) Between one to two years
 - d) More than two years before.
7. Which of the following needs you consider as most important for you? (Select only one)
 - a) Family Income Provision
 - b) Children Education and Marriage Provision
 - c) Retirement Provision
 - d) Collateral Security for Loans.
 - e) Wealth Creation
 - f) Tax Saving
8. Do you know about Human Life Value or Happy Family Project 1=4? Yes/ No.
If No, would you like our representative to call you and explain the same? Yes/ No.
9. Your valuable suggestions: _____

(Signature)