

ADVISOR ASSESMENT SHEET  
(To be filled by Branch Manager)

Candidate Name : \_\_\_\_\_

Background : \_\_\_\_\_

SM Name: \_\_\_\_\_ Date of Interview: \_\_\_\_/\_\_\_\_/\_\_\_\_

1. What is the monthly income goal you have from Agency? \_\_\_\_\_

2. What is your goal for your first year earning from Agency?

Less than 1 Lac     1 Lac to 3Lacs     3Lacs to 10Lacs     More than 10Lacs

3. How much time you are willing to dedicate on a weekly basis? \_\_\_\_\_Hours

4. Can you make 20 appointments and meet them in the first 30 days? (YES / NO) \_\_\_\_\_

5. Are you ready to come for training immediately after your selection? ( YES / NO) \_\_\_\_\_

6. Pls give two dates in the first 7 days for your training (DRF)?

A. \_\_\_\_/\_\_\_\_/\_\_\_\_  
    dd / mm / yyyy

B. \_\_\_\_/\_\_\_\_/\_\_\_\_  
    dd / mm / yyyy

7. Are you ready to go and give exam on the exam date? (YES / NO) \_\_\_\_\_

8. Which of the following do you own?

Mobile                       Motor Cycle                       Car  
 PAN Card                       Bank Account                       Income Tax Return  
 Ownership House

9. Have you been properly briefed about your responsibilities on :

Club Membership                       Condition for License

Declaration:

I Mr/Ms. \_\_\_\_\_, commit that I will attend 2 days training and will appear in the examination on the dates called for. I also commit that I will give sufficient effort and time for learning the business of Life Insurance Agency by coming to the office at least once a week every Saturday and will also give my best efforts and time for developing good number of customers with full honesty and integrity and earn higher income from my Life Insurance Agency.

Selected     Rejected

\_\_\_\_\_  
(Signature of Candidate)

\_\_\_\_\_  
(Signature of BM with stamp)