



CUSTOMER SURVEY FORM

Complete Name: _____ Contact No: _____
Last Name First Name Middle Name

1. Would you want your family to be financially secured?
 Yes No
2. Recent Family Development
 transferred to a new house
 newly married
 birth of a new member in the family
 others: _____
3. Rank financial needs on the following areas from 1-3 (1-most needed)
____ Education ____ Retirement ____ Protection
4. When was the last time your agent visited you?
 this week last week
 last month last year
 others: _____
5. What policy/ies do you have from Insular Life?

6. Given the chance, would you like to purchase another policy from Insular Life?
 Yes, because _____
 No, because _____
7. If yes, what type of products will you be interested in?
 Retirement Investment
 Education Life Insurance
 Accident Insurance Health Insurance
8. Do you get your premium notices before your due date?
 Yes No
9. Where or how do you usually pay your premiums?
Through:
 Agent Field Offices
 Our Bank Partners Automatic Debit
10. Are you satisfied in the way your financial advisor services your requirements?
 Yes
 No, because _____
11. Are you interested to have a free financial needs assessment?
 Yes No
12. Were the product features of your insurance plan explained to you by your agents?
 Yes No
13. Have you visited our website? Do you find it informative? What other information would you like us to include in our website?

14. Would you recommend Insular Life's product and services to your friends and/or family?
 Yes, because _____
 No, because _____
15. Do you see or hear the advertisements of Insular Life?
 Yes, through:
 Radio Newspaper
 Website Magazine
 No
16. What newspaper or magazines do you read?
 Phil. Star Good Housekeeping
 Phil. Daily Inquirer Entrepreneur
 Manila Bulletin Cosmopolitan
 others: _____
17. What do you do in your leisure time?
 Read Watch TV
 Travel Sports
 others: _____
18. How do you want to be serviced? Through:
 Financial Advisor Direct Mail
 Telemarketing E-mail
19. Would you like to be invited to Insular Life-sponsored events? What kind of event interests you?
 Yes, I'm interested in event/s such as:
 Advance Screening Concert
 Financial Forum others: _____
 No
20. Other comments _____

