

In-Home Survey

Name _____ Date _____

Your Age _____ DOB _____ Telephone _____

Spouses Name _____ Spouse Age _____ DOB _____

What was the reason that you sent in the card? _____

Which do you prefer for yourself?

Traditional Burial *Cremation* *Undecided*

Do you know what the average cost is around here? \$ _____

How much do you think yours will cost? \$5000 \$10,000 \$15000 *more*

Who will be in charge of your funeral arrangements some day?

Spouse *Daughter* *Son* *Relatives* *Friend* *Partner* *Don't Know*

What's their name? _____ Relationship _____

How did you intend for you arrangements to be paid?

Savings *Insurance* *Relative* *Not sure*

Do you know the difference between term life and whole life/final expense insurance?
(*This is where you explain benefits of Whole Life vs Term.*)

Yes *No*

Did you know Social Security only provides \$255 for funeral expenses which has been the same since 1952 and only if you qualify. Do you think this is a reasonable amount given today's funeral costs?

Yes *No*