

Customer Assessment Form Sample for Insurance Agencies

Use this **customer assessment form sample** to efficiently gather vital information from clients in insurance agencies. It streamlines the evaluation process, ensuring accurate risk profiling and tailored policy recommendations. Download the template to enhance client interactions and improve service delivery.

Full Name:

Date of Birth:

Phone Number:

Email Address:

Residential Address:

Employment Status:

Select...

Annual Income (USD):

Type of Insurance Needed:

Select...

Existing Insurance Policies:

List any existing policies...

Medical History or Relevant Risks:

Provide details if applicable...

Main Objective for Seeking Insurance:

Describe your primary needs for insurance...

Submit Assessment