Core7 Referral System

Application

Core7 Application

NAME:

_____

COMPANY:

_____

EMAIL ADDRESS:

_____

PHONE:

_____

With respect to each profession please rate your relationship with all:

- 0: I DO NOT HAVE A RELATIONSHIP
- 1-4: I am not satisfied with my current relationship
- 5-6: I have a relationship, and would be willing to consider working with someone else
- 7-8: I'm satisfied and would not consider working with anyone else
- 9-10: I have a true partner

Property & Casualty Insurance Agent: _____

Real Estate Agent: _____

Financial Advisor: _____

Real Estate Attorney/Escrow Officer: _____

Estate Planning Attorney: _____

Accountant: _____

Mortgage Originator: _____

How do you think you can help each of the following group members become increasingly successful?

Property & Casualty Insurance Agent:

Mortgage Originator:

Real Estate Agent:

Financial Advisor:

Accountant:

Estate Planning Attorney:

Real Estate Attorney/Escrow Officer:

How many clients do you speak with per month?

What are currently your most successful marketing activities?

Where does most of your business come from?

What fears or concerns do you have relating to being in this group?

Do you maintain a database?

How many contacts are in your database and what database management system do you use?

What do you do to stay in touch with your database? Please check all that apply:
- ☐ Mailings
- ☐ Email
- ☐ Phone Calls
- ☐ Face to Face Meetings
- ☐ Annual/Periodic Reviews

If you had an issue with a group member, how would you handle it?

If you're losing faith in a team member what would you do?

How often do you stay in touch with your database?

Please write a little about your business plan for this year?

Describe your process from start to finish when you are first meeting with a client?