



Insurance Advisors, Inc.

Our Business is Taking Your Business to the Next Level

Client N.E.A.D.S Analysis

N = NOW

Before we get started today, let's explore what type of coverage you have NOW? _____

E = ENJOY

What do you ENJOY about your current healthcare program? _____

A = ALTER

What could we ALTER or change about your current coverage that you have now? _____

D = DECISION MAKER

Do you make all your own medical decisions or is there someone else who is the DECISION MAKER? _____

S = SUMMARIZE

SUMMARIZE the client's answers and wishes from previous questions.
