



Character Reference Screening Guide

Name of Applicant _____ Home phone _____
 Name of Spouse _____ Work phone _____
 Address _____

Name	Phone #	Date Called	Called By
1.	h/w		
2.	h/w		
3.	h/w		
4.	h/w		
5.	h/w		
6.	h/w		

(*Name of Reference*), this is _____ (*Agent*) with Primerica. (*Name of New Rep*) is interviewing with us and he/she listed you as a reference. Do you have a few minutes to answer a couple of questions about (*Name of New Rep*)?
YES: Great. **NO:** When would be a good time to call back?

Questions	Ref 1	Ref 2	Ref 3	Ref 4	Ref 5	Ref 6
1. How long have you Known ____?						
2. Do you consider ____ to be an honest & trustworthy person?						
3. Has ____ ever been employed by you? Yes: in what capacity?						
4. Have you ever worked with ____? Yes: Have a good work ethic?						
5. Is ____ the type of person you Could trust with your money?						

One last thing: If we offer and (*Name of New Rep*) accepts a position, he /she will be required to obtain a field certification. And as part of this certification he/she is required to observe several field studies with someone he/she feels comfortable with. Could I put you (and your spouse) down as someone who'd help them out on this?

Willing to help with their training?	Y N	Y N	Y N	Y N	Y N	Y N
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YES: Great. I'm sure (*Name of New Rep*) will appreciate it. Let me ask? What do you normally do on _____ night? (*nothing*) Super! If (name of new rep) is accepted, I will have (*Name of New Rep*) call to set the time we can pop-by? Let me leave my name/number with you in case you have questions.

NO: Why? Is there something I need to know about (*Name of New Rep*)? Please level with me before I and others here spend too much time training (*Name of New Rep*)

By the Way, experience has taught me that people usually write down a higher quality reference than they are themselves. So let me ask you, are you the type of person who keeps your options open ...