

Life Insurance Lead Sheet

Date: **05/06/2003**

TSR Name: **Barbara**

TSR ID: **FLO**

Spoke To: **Tara**

Payne

Position: **Manager**

Business Name: **PALM HARBOR VILLAGE**

Address: **173 RENICK AVE**

City: **CHILLICOTHE**

State: **OH**

Zip Code: **45601**

Phone Number: **(740)774-9600**

1) Present Insurer: (If none go to point #3) **Western Southern Life**

It Is: An Individual Plan: **Yes**

A Group Plan through work: **Yes**

2) Policy Benefit Amount: **\$200,000.00** Premium per month: **\$56.00** per year: **n/a**

3) Who is (or would be) on the Plan: **Tara and family**

4) Person Spoke to: **Female** Age: **30** Children: **2: ages 5 & 8**

5) Spouse: **Male** Spouse's age: **32** Spouse's name: **Frank**

6) Number of Employees: **1+** Smokers: **Yes** If Yes, who: **Tara**

7) Pre-existing health conditions: **Yes** If Yes, what: **Frank has high blood pressure**

8) Wants: Group Quote: **No** Individual / Family Quote: **Yes**

A Quote for each Employee: **No**

ASAP

9) Interest in Additional Insurances: **Yes** What: **Home and Auto**

10) The local insurance agent, **YOUR NAME ON THIS LINE**

has permission to call.

The best time to call is: **At home on 05/07/03 @ (740)753-4287**

Special Notes: **Tara is a very nice lady. Wednesday 05/07/03 is Tara's day off, and she would like a call at home. Tara would like a comparison quote on individual life insurance for herself and her family.**

1-888-802-6998 -- www.tjtelemarketing.com - 2003

The leads are provided as just that, qualified leads. No refunds, credits or lead replacements.

> **SAMPLE -- Qualified Lead Sheet used for both Individual and Group Leads** <

Individual Leads: For our Standard Lead, we speak with any person who answers the phone. Usually, owners and managers make up 50% of the leads. Mechanics, secretaries, etc. make up the other 50%.

Owner or Manager Leads: In Rural Areas (regions where towns are separated by open land) we will speak with only Management People for leads @ \$3.00 more per lead than the Standard Lead.

Group Health Leads: We will get a Decision Maker for the company (only in Rural Areas)