

Health Insurance Lead Sheet

Date: **02/06/2009**

TSR Name: **Chuck**

TSR ID: **CHUCK**

Spoke To: **George**

Hardy

Position: **Manager**

Business Name: **City Tire and Service**

Address: **576 North Enterprise Place**

City: **Pleasantville**

State: **TX**

Zip Code: **75897**

Phone Number: **(972)497-2034**

- 1) Present Insurer: (If none go to point #3) **Golden Rule**
It Is: An Individual Plan: **Yes** A Group Plan through work: **No**
 - 2) Policy Deductible: **\$500, then 80/20** Copay(s): **\$25 doc. / \$20 prescript.**
Premium per month: **\$455.00** per year:
 - 3) Who is (or would be) on the Plan: **The family**
 - 4) Person Spoke to: **Male** Age: **42** Children: **3: 3, 7 & 10 years**
 - 5) Spouse: **Female** Spouse's age: **40** Spouse's name: **Jennifer**
 - 6) Number of Employees: **15** Smokers: **No** If Yes, who:
 - 7) Pre-existing health conditions: **No** If Yes, what:
 - 8) Wants: An Individual / Family Quote: **Yes**
A Quote for each Employee: **No**
 - 9) Interest in Additional Insurances: **Yes** What: **Retirement and Homeowners**
 - 10) The local insurance agent, **Dave Kleine**
has permission to call.
- The best time to call is: **Between 4:00 and 5:00 in the afternoon**

Special Notes: **George is willing to hear a comparison quote from you on his health insurance policy to see if he can improve it and/or save money. His family is very involved in Little League and helping out with the Special Olympics.**

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