

# Life Insurance Lead Sheet

Date: **02/06/2009**

TSR Name: **Chuck**

TSR ID: **OBR**

Spoke To: **Carla**

**Swenhurst**

Position: **Owner**

Business Name: **Walker Performance**

Address: **5685 Pineapple Drive**

City: **San Jose**

State: **CA**

Zip Code: **90292**

Phone Number: **(798)301-6505**

- 1) Present Insurer: (If none go to point #3) **MetLife/business & IL Life/individual**  
It Is: An Individual Plan: **Yes**      A Group Plan through work: **Yes**
  - 2) Policy Benefit Amount: **250k & 150k** Premium per month: **see notes** per year:
  - 3) Who is (or would be) on the Plan: **Carla is covered / the family also has plans**
  - 4) Person Spoke to: **Female**      Age: **47**      Children: **2: 13 and 17 years**
  - 5) Spouse: **Male**      Spouse's age: **50**      Spouse's name: **Larry**
  - 6) Number of Employees: **12**      Smokers: **Yes**      If Yes, who: **Larry**
  - 7) Pre-existing health conditions: **Yes**      If Yes, what: **Carla is on Thyroid medicine**
  - 8) Wants: Group Quote: **No**      Individual / Family Quote: **Yes**  
A Quote for each Employee: **No**
  - 9) Interest in Additional Insurances: **Yes**      What: **Property and Casualty**
  - 10) The local insurance agent, **William Germani**  
has permission to call.
- The best time to call is: **Early mornings before 10:00**

Special Notes: **Carla is paying for two plans, one personally (\$37/mo.) and one business (\$49/mo.), and is interested in comparison quotes from you. She said she is busy and asked for you to get to the point regarding your plans. Her deadline for giving her taxes to her CPA is 3 weeks away.**

1-888-802-6998 -- [www.tjtelemarketing.com](http://www.tjtelemarketing.com) - 2009

The leads are provided as just that, qualified leads according to our Terms of Sale.