

Group Health Insurance Lead Sheet

Date: 02/07/2009

TSR Name: Chuck

TSR ID: MAR

Spoke To: Kimberly

Wilson

Position: Human Resources

Business Name: Riverside Intermediate Services

Address: 1947 St. Charles Blvd.

City: Tulsa

State: OK

Zip Code: 74347

Phone Number: (918)586-1815

1) Present Insurer: (If none go to point #3) Blue Cross Blue Shield

It Is: An Individual Plan: No

A Group Plan through work: Yes

2) Policy Renewal Date: July 1

3) Policy Deductible: \$250

Copay(s): yes

Premium per month: no recall

per year:

4) Who is (or would be) on the Plan: 18 are presently covered

5) Person Spoke to: Female Age: 35

6) Number of Employees: 27

ASAP

7) Interest in Additional Insurances: Yes

What: other supplemental plans

8) The local insurance agent, Joe Rice

has permission to call.

The best time to call is: Friday afternoons - wrapping up the week

Special Notes: Kimberly said they are within a few months of their renewal date and would like you to call and set up a time next week to get started on a comparison quote for their Group Health coverage. She said to be sure and share the optional supplemental insurances for comparison quotes as well.

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