

Homeowner Retirement Plan Lead Sheet

Date: **02/07/2009**

TSR Name: **Chuck**

TSR ID: **CHUCK**

Spoke To: **Theresa**

Babcock

Position: **Exec. Secretary**

Business Name: **McDuff Law Firm**

Address: **1210 451st St E**

City: **Puyallup**

State: **WA**

Zip Code: **98392**

Phone Number: **(253) 599-9985**

1) Present Company / Plan: (If none go to point #3) **plan through work**

It Is: An I. R. A.: **No**

A 401K: **Yes**

Other:

2) When the Present Plan was initiated: **6 years**

Contribution Schedule: **Weekly**

Contribution Amount: **5 percent**

3) Who is (or would be) on the Plan: **No, her husband is a Independent Cont. / Plummer**

4) Person Spoke to: **Theresa**

Age: **37**

Contact's Gender **Female**

Children: **Three: 5, 9 and 14**

5) Spouse: **Male**

Spouse's age: **42**

Spouse's name: **Harold**

6) Number of Employees: **12**

7) Wants: To hear about Retirement Plans: **No**

To hear about Additional Plans: **Yes**

To hear about a Rollover: **N/A**

8) This person is a Home Owner: **Yes**

9) The local insurance agent, **Jack Crabtree**, has permission to call.

The best time to call is: **In the evenings on cell: 253-567-9999**

Special Notes: **Theresa said to call her on her cell as her boss does not want her spending time on non-business things at work - see # above. She said both she and Harold know they need to plan for their retirement on their own because they do not have much confidence in Social Security for the future.**

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