

# Retirement Plan Lead Sheet

Date: **02/06/2009**

TSR Name: **Chuck**

TSR ID: **SMI**

Spoke To: **Jeff**

**Wilkinson**

Position: **Owner**

Business Name: **Creekside Design**

Address: **8971 McDowell Road North**

Job Number

City: **Horton**

State: **MS**

Zip Code: **39894**

Phone Number: **(601) 382-0758**

1) Present Company / Plan: (If none go to point #3) **Green Tree Financial**

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

A 401K: **Yes**

Other: **Real Estate**

2) When the Present Plan was initiated: **8 years**

Contribution Schedule: **Monthly**

Contribution Amount: **6 percent**

3) Who is (or would be) on the Plan: **No, Pam also has some IRAs**

4) Person Spoke to: **Jeff**

Age: **54**

Contact's Gender **Male**

Children: **2 Grown Children**

5) Spouse: **Female**

Spouse's age: **56**

Spouse's name: **Pam**

6) Number of Employees: **1**

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

To hear about Additional Plans: **Yes**

To hear about a Rollover: **Yes**

8) The local insurance agent, **Robert Smith**

, has permission to call.

The best time to call is: **Saturdays on his cell: 601-896-9898**

Special Notes: **Jeff said he is interested in getting his retirement plans nailed down and welcomes your input. He wants to hear about the plans you have both for himself and his wife. They have replaced their children with two Jack Russel Tarriers.**

1-888-802-6998 -- www.tjtelemarketing.com -- 2009

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