

401(k) Retirement Plan Lead Sheet (Example)

Date **06/13/2016 12:37** TSR Name **Cheri E.** TSR ID **Cheri**

Spoke to: **Kathie** **Royles** Position: **Accountant**

Business Name: **Dodge Creative Inc.** Address: **740 North Seneca St.**
City: **Haysville** State: **KS** Zip Code: **67059** Phone Number: **13165232000**

Have A 401(k) **YES**
401(k) Provider **American Funds**
How Long? **13 years +**
Does Best? **"keeps us notified of changes"**
Improvement Needed? **needs to be more personal...more face to face:**
Last Shopped **Not since she has been here.**
Rate Plan **6**
Rate Advisor **6**
Best Time To Call **Mornings are best.**
Comparison Quote **YES**

Special Notes: **Kathie is interested in hearing from you about the 401(k) plans you offer. Conversation was pleasant & flowed nicely. Not much small talk throughout the convo. She did say that she wishes she had more personal interactions vs. e-mail all the time with their current advisor. Kathie seems to be polite and receptive to your information. HAVE A GREAT REST OF YOUR WEEK, ADVISOR!! :))**