

# Annuity Lead Sheet

Date: 04/22/2011

TSR Name: Karla

TSR ID: MAR

Spoke To: Diane

Newman

Position: Owner

Business Name: Reliable Auto & Truck Repair Llc

Address: 575 Prospect st swt 203

Job Number

City: Lakewood

State: NJ

Zip Code: 8701

Phone Number: (732) 961-0220

1) Present Company / Plan: (If none go to point #3) No Retirement Plan

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

A 401K: No

Other:

2) When the Present Plan was initiated:

Contribution Schedule:

Contribution Amount:

3) Who is (or would be) on the Plan: Diane & husband

4) Person Spoke to: Diane

Age: 47

Contact's Gender Female

Children: 2 grown children

5) Spouse: Male

Spouse's age: 50

Spouse's name: Bryan

6) Number of Employees: 7

7) Wants: To hear about Annuity Retirement Plans: Yes

To hear about Additional Plans: No

To hear about a Rollover: No

8) The local insurance agent, Matt or Mike Hendricks, has permission to call.

The best time to call is: Please call next week. Mornings are best to reach her.

Special Notes: Diane would like a brief call next week to set up an appointment for the following week to hear about your Annuity Retirement Plans you have available for her and possibly her husband. They just moved their business so things are a little hectic right now for them. She was a pleasure to speak with.

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