

# Individual Health Insurance Lead Sheet (Example)

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Date **06/13/2016 13:23**      TSR Name **Brianna J.**      TSR ID **Brianna**

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Spoke to: **Michelle**      **London**      Position: **Scheduler**

Business Name: **Paramount Billing Services**      Address: **900 97th Street**  
City: **Mokena**      State: **IL**      Zip Code: **60447**      Phone Number: **170847723872**

Have Coverage?      **Individual plan  
"Assurant"**  
Age      **43**  
Ind. Company      **Assurant**  
Deductible/Co-Pay      **Deductible is \$5-  
6000**  
Ind. Premium      **\$450**  
Who's Covered      **Michelle**  
Married      **YES**  
Children      **3 year old twin  
boys**  
Confirm Decision Maker  
Best Time To Call      **Monday - Friday  
9am - 12pm**  
Other Interests      **No**  
Prospects Sex      **FEMALE**  
Ind      **COMPARISON**

Special Notes: **Michelle will take a call next week for some information about insurance for herself and her twin boys. Her husband has a policy through work but it is even more expensiver than the silver plan she bought on the exchange. She feels like the plan she has now is a little over priced. Michelle did mention she is a smoker. Michelle is nice and easy to speak with.**