

# Retirement Plan Lead Sheet (Example)

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Date **06/13/2016 12:09**      TSR Name **Hillary F.**      TSR ID **Hillary**

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Spoke to: **Corrine Swenson**      Position: **Controller**

Business Name: **World Energy Services**      Address: **24 Rockwell Street**  
City: **Worcester**      State: **MA**      Zip Code: **01604**      Phone Number: **17744764201**

Have A Plan?      **YES**  
Contribution Frequency      **MONTHLY**  
Marital Status      **Yes**  
Age      **56**  
Spouses Age      **59**  
Business or Personal Plan      **BUSINESS,  
PERSONAL**  
Spouse's Name      **Larry**  
Best Time To Call      **Please call this  
Friday**  
Prospects Sex      **FEMALE**  
Children      **25 year old  
daughter.**  
% Income Contributed      **10%**  
How Many Employed      **21**  
Company      **Merrill Lynch**  
Type Of Plan      **401(k)**  
Plan Duration      **25 years.**  
Family with Plans      **No.**

Special Notes: **Corrine would like for you to call her regarding retirement plans. Corrine has been at this company for about 2 years. She participates up to the company match in this company. The bulk of her retirement is in her Merrill Lynch account. She would like to talk about options with that, and her husband retiring next year from his position as a teacher.**