

# Life Insurance Lead Sheet (Example)

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Date **06/13/2016 11:17**      TSR Name **Hillary F.**      TSR ID **Hillary**

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Spoke to: **Ronnie**      **Disick**      Position: **Owner**

Business Name: **R L Disick Inc**      Address: **469 Morgan Street**  
City: **Valley Stream**      State: **NY**      Zip Code: **11580**      Phone Number: **15168135214**

Is this coverage thru Biz or Personal?      **Company**  
Insurance Company      **Farmers**  
Benefit Amount      **\$450,000**  
Premium      **His accountant handles payments**  
Covered      **Self and business partner**  
Prospects Sex      **MALE**  
Age      **51**  
Spouse's name      **Kristy**  
Spouses Age      **46**  
Children      **3 children, ages 15, 12 and 10**  
Smokers      **NO**  
Conditions      **NO**  
What Condition?      **no conditions**  
Other Interests      **Yes, Retirement**  
Employees      **Five**  
Best Time To Call      **Around 2:30pm is best**  
Additional Insurance      **YES**

Special Notes: **Ronnie would like for you to call him regarding additional life insurance. He mentioned he used to have more life insurance through his prior employment but it ended when he stopped working there. He was soft spoken, calm, genuine and a pleasure to speak with.**