

Supplemental Health Insurance Plan Lead Sheet (Example)

Date **06/13/2016 12:29** TSR Name **Karla M.** TSR ID **Karla**

Spoke to: **Erick** **Parkes** Position: **General Manager**

Business Name: **Powers Automation Inc** Address: **61533 American Loop Ste 1**

City: **Bend** State: **OR** Zip Code: **97702** Phone Number: **15413301687**

GH Renewal Date **December**

Have Coverage? **YES**

Currently Have Supp coverage? **YES**

Best Time To Call **Please call next Tuesday around 10:00 am he will be meeting with the partners later that day**

Specific Interests? **Voluntary Life Insurance, STD, LTD**

Insurance Company **AFLAC**

Prospects Sex **MALE**

Benefits Currently Offered **Life and Accidental**

Who Pays? **Company Pays Lion's Share**

Pre/Post Tax Premiums? **Post-tax monies**

Supplemental Benefits Renewal **No renewal on current AFLAC plan**

Employees Covered Under Plan **about half**

Employees - Company **39**

Special Notes: **Erick would like to hear your Voluntary Life Insurance Policies that you have available. He has a meeting with the Partners next week and would like to have your information to share with them. He was very easy to speak with and has a pleasant personality.**