

STATUS

DATE

AGENCY

★ NEW 06/25/15

CUSTOMER GARCIA*Life*

Not Assigned



★ NEW 06/25/15

CUSTOMER HAMILTON*Life*

Agency Namehere



✓ ASSIGNED 06/22/15 | Standard

CUSTOMER THOMPSON*Disability*

Agency Namehere



! RETURNED 06/20/15 | Standard

CUSTOMER NICHOLSON*Annuities, Disability, Life*

Agency Namehere



! RETURNED 06/19/15 | Disability

< Leads

CUSTOMER GARCIA

★ NEW 06/25/15

CUSTOMER GARCIA

Life

Not Assigned

Standard

Priority

ASSIGN

REJECT

My Notes

Enter text here

Customer Details

345 Maple Drive

Floor 67

San Luis Obispo, CA 92008



(917) 999-7899



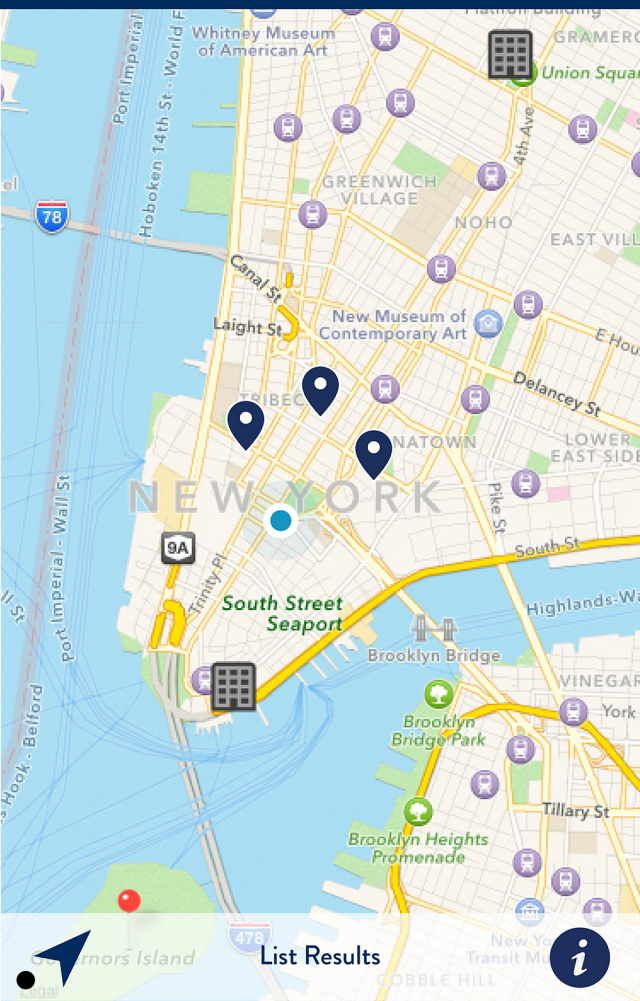
MICKEY@MOUSE.COM

Customer Note

Researching for my father

Cancel

ASSIGN



List Results



Cancel

ASSIGN

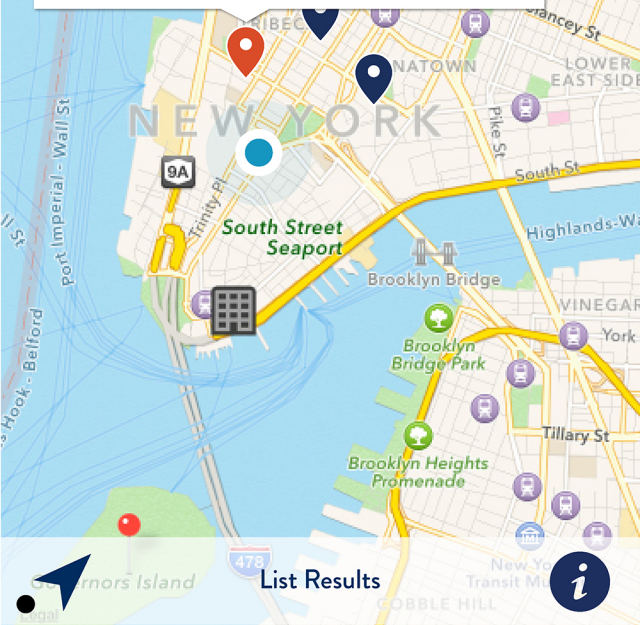
Agency Namehere

345 Will Street

Floor 13

New York, NY 10004

CONFIRM ASSIGNMENT



List Results



STATUS

DATE

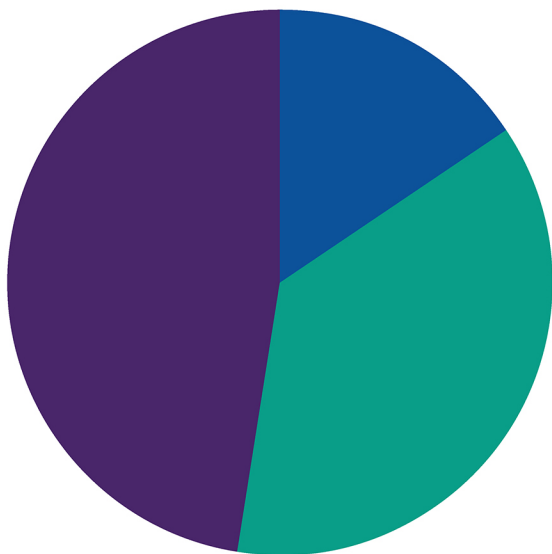
AGENCY

SUMMARY

06/18/2015

Summary

MY CURRENT STATISTICS

 13 NEW 12 ASSIGNED 3 RETURNED List Summary Profile

[< Back to details](#)

COMMENTS

Previous Comments

Left a voicemail for the client on Wednesday and will follow up next week

(FR) *John Walker, 3:16pm on 07/20/15*

I spoke with this potential client and he requests that you call don't call him before 07/20/15 since he'll be out of the country.

(A) *Agnes Gund, 4:04pm on 07/10/15*

This lead emailed us three times in one day, he seems anxious to speak with someone.

(C) *William Tayler, 3:55pm on 07/10/15*