

# PROSPECT SHEET

Date of First: \_\_\_\_\_

\*FAA: \_\_\_\_\_ \*SHD SRC: \_\_\_\_\_ \*SRC: \_\_\_\_\_ CLS: \_\_\_\_\_ \*SRV: \_\_\_\_\_

Pre-Appointment Notes: Picture Taken?

\*Status: \_\_\_\_\_

\*Segment : \_\_\_\_\_

Name: \_\_\_\_\_  Preferred Contact

\*Date of Birth: \_\_\_\_\_ Age: \_\_\_\_\_

\*Cell: \_\_\_\_\_

\*Email: \_\_\_\_\_

Address: \_\_\_\_\_

Employer: \_\_\_\_\_ \*Retirement Age/Date: \_\_\_\_\_

Earned Income: \_\_\_\_\_

PIA: \_\_\_\_\_ SS: \_\_\_\_\_

Name: \_\_\_\_\_  Preferred Contact

\*Date of Birth: \_\_\_\_\_ Age: \_\_\_\_\_

\*Cell: \_\_\_\_\_

\*Email: \_\_\_\_\_

Address: \_\_\_\_\_

Employer: \_\_\_\_\_ \*Retirement Age/Date: \_\_\_\_\_

Earned Income: \_\_\_\_\_

PIA: \_\_\_\_\_ SS: \_\_\_\_\_

**Notes:**

*Estate Plan / Insurance / Family / Other*

*2nd Appointment Agenda*

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**NOTES CONTINUED:**

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## PROSPECTING CHANNEL

### Prospecting Category: (Check the Box)

Group Education

Online Presence

Events

Referral

Personal Network

Paid Advertising

<b>Prospecting Channel:</b> (Check one)		
<p style="text-align: center;"><b><u>Group Education</u></b></p> <p>Intermountain</p> <p>ARUP</p> <p>School District</p> <hr/> <p>Client Webinar/Education</p> <hr/> <p>Prospect Webinar/Education</p> <hr/> <p>Other Organized Group</p> <hr/>	<p style="text-align: center;"><b><u>Online Presence</u></b></p> <p>Podcast - Lindsay</p> <p>Podcast - TFC</p> <p>Youtube - 90 Days</p> <p>Youtube - Retirement Nerds</p> <p>Youtube - Zacc</p> <p>Podcast - Guest</p> <p>Social Media</p> <hr/> <p>News</p> <p>Website</p> <hr/>	<p style="text-align: center;"><b><u>Referral</u></b></p> <p>COI - SRC Code</p> <p>_____</p> <p>COI - Non-Client (Industry Professional)</p> <p>_____</p> <p>COI - Non-Client (Non-Industry Professional)</p> <p>_____</p> <p>Client    Prospect/Lead    <small>MakeVIP?</small></p> <p>_____</p> <p>HR Employee</p> <p style="padding-left: 40px;">Company: _____</p> <p style="padding-left: 40px;">Individual: _____</p>
<p style="text-align: center;"><b><u>Events</u></b></p> <p>Event - Prospecting</p> <p>E Event - Client</p>	<p style="text-align: center;"><b><u>Paid Advertising</u></b></p> <p>Billboard</p> <p>Smart Asset</p> <p>Nerd Wallet</p>	<p style="text-align: center;"><b><u>Personal Network</u></b></p> <p>Advisor</p> <p>Support Staff/RM Manager</p> <p>Executive</p> <p>Employee: _____</p>

## ACTION ITEMS

### Tasks

Task Owner: \_\_\_\_\_

Task Owner: \_\_\_\_\_

Subject: \_\_\_\_\_

Subject: \_\_\_\_\_

Due Date: \_\_\_\_\_

Due Date: \_\_\_\_\_

Comments:

Comments:

### Opportunity 1

Stage (check one)

Potential Assets

Date Specific

| CLOSE IT

Opp Size: \_\_\_\_\_

Opp Description:

Close Date: \_\_\_\_\_

Opp Owner: \_\_\_\_\_

Opp Title: \_\_\_\_\_

### Opportunity 2

Stage (check one)

Potential Assets

Date Specific

| CLOSE IT

Opp Size: \_\_\_\_\_

Opp Description:

Close Date: \_\_\_\_\_

Opp Owner: \_\_\_\_\_

Opp Title: \_\_\_\_\_

## DIVORCE PLANNING INFO

### **Divorce: Dates/Status**

### **Divorce: Children Info**