

For Questions, please call 800-846-7745



**Client Information:**  
**Client:** ABC Insurance Agency  
**Contact:** Happy Client  
**List Source:** G&D List 3-2006  
**From Employee:** Ashley Banares

**Appointment Date: 08/13/2008 Time: 10:00AM**

File Updated on Thu 08/01/2008 at 9:22 AM

Company Information:		Decision Maker Information:	
<b>Company Name:</b>	Atkins Construction Company		
<b>Contact Name:</b>	Cindy Atkins	<b>D.M.:</b>	Dale Atkins
<b>Contact Title:</b>	Controller	<b>D.M. Title:</b>	President
<b>Phone:</b>	555-555-5555	<b>D.M. Phone or Ext.:</b>	100
<b>Fax:</b>	555-555-5556	<b>Address:</b>	
<b>Email:</b>	<a href="mailto:Cindy@Atkins.com">Cindy@Atkins.com</a>	333 State St Aliso Viejo, CA 92656	
<b>Website:</b>	<a href="http://www.atkins.com">www.atkins.com</a>		
Policy Information:		Profile Information:	
<b>Pkg Carrier:</b>		<b>X-Date:</b>	<b>Num. of Emp:</b> 70
<b>Wrk.Comp:</b>		<b>X-Date:</b>	<b>Autos:</b>
<b>Auto:</b>		<b>X-Date:</b>	<b>Locations:</b> 1
<b>Health:</b>	Blue Cross	<b>X-Date:</b> 10/01/2008	<b>Emp's. Covered:</b> 35
<b>Professional:</b>	N/A	<b>X-Date:</b> N/A	<b>Sales Volume:</b> \$12.0M
<b>P&amp;C Agency:</b>			<b>SIC Code:</b> 1799-0900
<b>Benefit Agency:</b>	RST Ins Agency		<b>Business Type:</b> Building site preparation

**Appointment Notes:**

**08/01/08 :** Has been with RST Insurance Agency for a long time. However, they're extremely unhappy with their service & rates regarding their Benefits. She said that they want to make a change quickly. Most of the employees are covered for group Health, Dental & 401K. They don't have a Vision plan & are open to discussing the program you have available for Vision. Has all info ready. Asked for an email stating exactly what we need & she will fax it right over so we can get started & make the most of our meeting on the 13<sup>th</sup> of August. Super nice lady. Said "We are making a change this year. I will not stay with RST Insurance Agency". – **Ashley B.**