

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

Date: 01/01/2009 Time: X-Date

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

Company Information:		Decision Maker Information:	
Company Name:	Atkins Bed & Breakfast		
Contact Name:	Cindy Atkins	D.M.:	Dale Atkins
Contact Title:	Controller	D.M. Title:	President
Phone:	555-555-5555	D.M. Phone or Ext.:	100
Fax:	555-555-5556	Address:	
Email:	Cindy@Atkins.com	333 State St Aliso Viejo, CA 92656	
Website:	www.atkins.com		
Policy Information:		Profile Information:	
Pkg Carrier:	CNA	X-Date: 01/01/2009	Num. of Emp: 35-40
Wrk.Comp:	CNA	X-Date: 01/01/2009	Autos: 2
Auto:	CNA	X-Date: 01/01/2009	Locations: 4
Health:		X-Date:	Emp's. Covered:
Professional:	N/A	X-Date: N/A	Sales Volume: \$3.0M
P&C Agency:	XYZ Insurance Agency		SIC Code: 7011-0000
Benefit Agency:			Business Type: Hotels & Motels

Appointment Notes:

08/01/08 : Has been with XYZ Insurance Agency for a long time. However, they're not that happy with the service they've been getting from them lately. Therefore, they said they will be reviewing their options this year & to give them a call closer towards the renewal to discuss their options with us further. – **Ashley B.**