


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

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

Company Information:	Decision Maker Information:
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Company Name:	Atkins Construction Company		
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:
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Pkg Carrier:	CNA	X-Date: 12/01/2008	Num. of Emp:	35-40
Wrk.Comp:	CNA	X-Date: 12/01/2008	Autos:	14
Auto:	CNA	X-Date: 12/01/2008	Locations:	1
Health:	Blue Cross	X-Date: 01/01/2009	Emp's. Covered:	30
Professional:	N/A	X-Date: N/A	Sales Volume:	\$3.0M
P&C Agency:	XYZ Insurance Agency		SIC Code:	1799-0900
Benefit Agency:	RST Ins Agency		Business Type:	Building site preparation

Appointment Notes:

08/01/08 : Has been with XYZ Insurance Agency for a long time. However, they're extremely unhappy with their service & rates. She said that they want to make a change quickly. Most of the vehicles are pick ups & has 3 SUV's. 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 13th of August. Super nice lady. Said "We are making a change this year. I will not stay with XYZ Insurance Agency". – **Ashley B.**