

GOALS & LEADS

Monthly Goals Recap

*Almost every successful person begins with two beliefs:
the future can be better than the present, and I have the power to make it so!*

Let's talk about _____

Last month was a _____

My wins were: _____

My struggles were: _____

Here is a recap:

AUTO: My goal was ___ RNA, I ended the month with ___. I averaged ___ auto quotes per day and ___ referral names. Looking back, if I could change one thing it would be _____.

FIRE: My goal was ___ fire apps, I ended the month with ___ total fire.
I wrote ___ HO ___ Renters ___ PLUPs ___ PAPs ___ Business ___ Other.
Next month I am going to concentrate on _____.

LIFE: My goal was ___ LIFE Apps and \$_____ monthly Life PAC.
I ended the month with ___ apps and \$_____ PAC. I had ___ life appointments and did ___ LNAs. I have ___ people on my life hotlist! How many times did I call on life? ___

HEALTH: My goal was ___ Health Apps. I ended with ___.

BUSINESS: I visited or called on ___ businesses. I wrote ___ Business Autos and ___ business policies. I need training on _____.

Monthly Goals — Looking Forward

The only person I have to beat is the person I was last month!

My AUTO goal is _____. I will average ____ auto quotes per day and get ____ referrals in order to meet my goal.

My FIRE goal is _____. To hit my goal I will need to:

My LIFE goal is ____ with ____ (pac). To do this, I will do ____ LNA's, set ____ appointments per week. I will also:

My HEALTH goal is ____ with ____ (pac). To do this, I will do ____ DI/HI quotes. I will also:

My BUSINESS goal is ____ Autos & ____ Businesses and I will visit or call ____ new businesses. Here are some of the new businesses I will visit or call:

To help out the team this month, I will:

Anything you would like to talk about?

Multi-Line Pivot Quick Quotes

Life Insurance (Non-Tobacco) - Updated 05/01/2023												Health Insurance - Updated 02/27/23			
Policy	10 Year Term		Whole Life		Instant Answer		GIFE		GIFE		Supp Hospital Income		SHI Plus		
	\$125,000 With WPD		\$25,000 w /WPD until 60 and GIO until 38		\$50,000 Choice		\$10,000		\$15,000		\$250 Payout Per Day \$3500 Hospital Admission		\$250 Payout Per Day \$2500 Hospital Admission		
Age	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	
16	N/A	N/A	\$31.56	\$28.48	\$26.00	\$22.00	N/A	N/A	N.A	N/A	\$8.08	\$14.78	\$9.69	\$15.61	
17	N/A	N/A	\$32.19	\$28.82	\$26.00	\$22.00	N/A	N/A	N.A	N/A	\$8.08	\$14.78	\$9.69	\$15.61	
18	\$20.88	\$17.73	\$33.78	\$30.17	\$26.00	\$22.00	N/A	N/A	N.A	N/A	\$8.08	\$14.78	\$9.69	\$15.61	
19	\$20.88	17.73	\$34.50	\$30.56	\$26.00	\$22.00	N/A	N/A	N.A	N/A	\$8.08	\$14.78	\$9.69	\$15.61	
20	\$20.88	17.73	\$35.18	\$30.96	\$26.00	\$22.00	N/A	N/A	N.A	N/A	\$8.08	\$14.78	\$9.69	\$15.61	
21	\$20.88	17.73	\$35.65	\$31.55	\$26.00	\$22.00	N/A	N/A	N.A	N/A	\$8.08	\$14.78	\$9.69	\$15.61	
22	\$20.88	17.73	\$36.11	\$32.21	\$26.00	\$22.00	N/A	N/A	N.A	N/A	\$8.08	\$14.78	\$9.69	\$15.61	
23	\$20.88	17.73	\$36.72	\$32.91	\$26.00	\$22.00	N/A	N/A	N.A	N/A	\$8.08	\$14.78	\$9.69	\$15.61	
24	\$20.88	17.73	\$37.26	\$33.65	\$26.00	\$22.00	N/A	N/A	N.A	N/A	\$8.08	\$14.78	\$9.69	\$15.61	
25	\$20.88	17.73	\$37.90	\$34.41	\$26.00	\$22.00	N/A	N/A	N.A	N/A	\$8.08	\$14.78	\$9.69	\$15.61	
26	\$20.99	\$18.05	\$38.83	\$35.24	\$26.00	\$22.00	N/A	N/A	N.A	N/A	\$8.08	\$14.78	\$9.69	\$15.61	
27	\$20.99	\$18.28	\$39.80	\$36.10	\$26.00	\$22.00	N/A	N/A	N.A	N/A	\$8.08	\$14.78	\$9.69	\$15.61	
28	\$21.11	\$18.50	\$40.83	\$37.01	\$26.00	\$22.00	N/A	N/A	N.A	N/A	\$8.08	\$14.78	\$9.69	\$15.61	
29	\$21.11	\$18.61	\$41.92	\$37.93	\$26.00	\$22.00	N/A	N/A	N.A	N/A	\$8.08	\$14.78	\$9.69	\$15.61	
30	\$21.21	\$18.82	\$43.07	\$38.96	\$26.00	\$22.00	N/A	N/A	N.A	N/A	\$8.08	\$19.96	\$9.69	\$20.09	
31	\$21.42	\$19.25	\$44.26	\$40.02	\$26.00	\$22.00	N/A	N/A	N.A	N/A	\$8.08	\$19.96	\$9.69	\$20.09	
32	\$21.65	\$19.58	\$45.54	\$41.14	\$26.00	\$22.00	N/A	N/A	N.A	N/A	\$8.08	\$19.96	\$9.69	\$20.09	
33	\$21.76	\$19.80	\$46.89	\$42.31	\$26.00	\$22.00	N/A	N/A	N.A	N/A	\$8.08	\$19.96	\$9.69	\$20.09	
34	\$22.19	\$20.34	\$48.87	\$43.54	\$26.00	\$22.00	N/A	N/A	N.A	N/A	\$8.08	\$19.96	\$9.69	\$20.09	
35	\$22.50	\$20.65	\$50.21	\$44.77	\$26.00	\$22.00	N/A	N/A	N.A	N/A	\$10.50	\$22.19	\$11.31	\$22.27	
36	\$23.40	\$21.55	\$52.06	\$46.14	\$26.00	\$22.00	N/A	N/A	N.A	N/A	\$10.50	\$22.19	\$11.31	\$22.27	
37	\$24.16	\$22.31	\$53.89	\$47.55	\$26.00	\$22.00	N/A	N/A	N.A	N/A	\$10.50	\$22.19	\$11.31	\$22.27	
38	\$25.24	\$23.28	\$52.55	\$45.70	\$26.00	\$22.00	N/A	N/A	N.A	N/A	\$10.50	\$22.19	\$11.31	\$22.27	
39	\$26.22	\$24.37	\$54.55	\$47.20	\$26.00	\$22.00	N/A	N/A	N.A	N/A	\$10.50	\$22.19	\$11.31	\$22.27	
40	\$27.42	\$25.46	\$56.62	\$48.74	\$26.00	\$22.00	N/A	N/A	N.A	N/A	\$13.85	\$24.31	\$15.05	\$24.40	
41	\$29.47	\$26.75	\$59.19	\$50.40	\$33.00	\$27.00	N/A	N/A	N.A	N/A	\$13.85	\$24.31	\$15.05	\$24.40	
42	\$31.87	\$27.96	\$61.95	\$52.16	\$33.00	\$27.00	N/A	N/A	N.A	N/A	\$13.85	\$24.31	\$15.05	\$24.40	

Multi-Line Pivot Quick Quotes

Life Insurance (Non-Tobacco) - 05/01/2023											Health Insurance - Updated 02/27/23			
Policy	10 Year Term		Whole Life		Instant Answer		GIFE		GIFE		Supp Hospital Income		SHI Plus	
	\$125,000 With WPD		\$25,000 w/WPD until 60 and GIO until 38		\$50,000 Choice		\$10,000		\$15,000		\$250 Payout Per Day \$3500 Hospital Admission		\$250 Payout Per Day \$2500 Hospital Admission	
Age	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
43	\$34.16	\$29.37	\$64.84	\$54.01	\$33.00	\$27.00	N/A	N/A	N/A	N/A	\$13.85	\$24.31	\$15.05	\$24.40
44	\$35.89	\$30.56	\$67.78	\$55.96	\$33.00	\$27.00	N/A	N/A	N/A	N/A	\$13.85	\$24.31	\$15.05	\$24.40
45	\$37.85	\$31.98	\$70.84	\$58.05	N/A	N/A	\$34.10	\$29.17	\$48.10	\$40.71	\$18.60	\$27.47	\$19.54	\$28.48
46	\$39.92	\$33.61	\$74.09	\$60.49	N/A	N/A	\$35.55	\$30.30	\$50.28	\$42.41	\$18.60	\$27.47	\$19.54	\$28.48
47	\$42.09	\$35.46	\$77.60	\$63.16	N/A	N/A	\$37.01	\$31.43	\$52.47	\$44.10	\$18.60	\$27.47	\$19.54	\$28.48
48	\$44.48	\$37.42	\$81.48	\$66.10	N/A	N/A	\$38.46	\$32.56	\$54.65	\$45.79	\$18.60	\$27.47	\$19.54	\$28.48
49	\$47.53	\$39.91	\$86.00	\$69.39	N/A	N/A	\$39.92	\$33.69	\$56.84	\$47.48	\$18.60	\$27.47	\$19.54	\$28.48
50	\$51.66	\$43.61	\$90.98	\$74.19	N/A	N/A	\$41.38	\$34.82	\$59.02	\$49.18	\$25.97	\$36.74	\$28.39	\$41.08
51	\$54.06	\$45.36	\$96.01	\$78.15	N/A	N/A	\$43.35	\$36.33	\$61.98	\$51.45	\$25.97	\$36.74	\$28.39	\$41.08
52	\$55.58	\$46.34	\$100.86	\$81.52	N/A	N/A	\$45.33	\$37.85	\$64.95	\$53.72	\$25.97	\$36.74	\$28.39	\$41.08
53	\$57.21	\$47.31	\$105.54	\$85.28	N/A	N/A	\$47.31	\$39.37	\$67.92	\$56.01	\$25.97	\$36.74	\$28.39	\$41.08
54	\$58.84	\$48.29	\$110.45	\$89.09	N/A	N/A	\$49.29	\$40.88	\$70.88	\$58.28	\$25.97	\$36.74	\$28.39	\$41.08
55	\$60.35	\$49.15	\$116.10	\$93.05	N/A	N/A	\$51.26	\$42.40	\$73.85	\$60.55	\$38.20	\$42.62	\$39.96	\$46.68
56	\$64.61	\$52.21	\$119.82	\$96.33	N/A	N/A	\$53.69	\$44.21	\$77.49	\$63.27	\$38.20	\$42.62	\$39.96	\$46.68
57	\$68.96	\$55.26	\$124.72	\$99.96	N/A	N/A	\$56.12	\$46.03	\$81.14	\$66.00	\$38.20	\$42.62	\$39.96	\$46.68
58	\$73.40	\$58.18	\$129.72	\$104.43	N/A	N/A	\$58.55	\$47.84	\$84.78	\$68.72	\$38.20	\$42.62	\$39.96	\$46.68
59	\$77.75	\$61.00	\$134.39	\$108.87	N/A	N/A	\$60.99	\$49.66	\$88.44	\$71.45	\$38.20	\$42.62	\$39.96	\$46.68
60	\$79.78	\$61.23	\$136.44	\$111.56	N/A	N/A	\$63.41	\$51.48	\$92.08	\$74.17	\$58.28	\$53.51	\$58.37	\$56.84
61	\$87.22	\$66.55	\$143.18	\$116.60	N/A	N/A	\$66.90	\$54.14	\$97.31	\$78.17	\$58.28	\$53.51	\$58.37	\$56.84
62	\$95.15	\$72.43	\$151.01	\$121.93	N/A	N/A	\$70.39	\$56.81	\$102.54	\$82.17	\$58.28	\$53.51	\$58.37	\$56.84
63	\$104.48	\$78.84	\$158.89	\$127.50	N/A	N/A	\$73.88	\$59.47	\$107.78	\$86.16	\$58.28	\$53.51	\$58.37	\$56.84
64	\$113.75	\$85.80	\$166.13	\$133.29	N/A	N/A	\$77.37	\$62.14	\$113.01	\$90.17	\$58.28	\$53.51	\$58.37	\$56.84
65	\$124.42	\$93.53	\$173.87	\$139.46	N/A	N/A	\$80.86	\$64.81	\$118.24	\$94.16	108.58	90.59	116.67	101.74
66	\$139.85	\$104.08	\$181.00	\$146.12	N/A	N/A	\$85.41	\$68.70	\$125.07	\$100.00	108.58	90.59	116.67	101.74
67	\$157.37	\$115.82	\$188.07	\$152.75	N/A	N/A	\$89.96	\$72.58	\$131.89	\$105.82	108.58	90.59	116.67	101.74
68	\$177.04	\$128.98	\$194.23	\$160.23	N/A	N/A	\$94.52	\$76.46	\$138.73	\$111.65	108.58	90.59	116.67	101.74
69	\$199.34	\$143.77	\$200.71	\$168.26	N/A	N/A	\$99.07	\$80.35	\$145.56	\$117.47	108.58	90.59	116.67	101.74
70	\$224.57	\$160.40	\$207.45	\$175.46	N/A	N/A	\$103.62	\$84.23	\$152.38	\$123.30	108.58	90.59	116.67	101.74

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Age	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
71	253.17	178.89	\$214.35	\$183.31	N/A	N/A	\$110.13	\$89.92	\$162.14	\$131.84	108.58	90.59	116.67	101.74
72	285.37	199.67	\$221.53	\$192.95	N/A	N/A	\$116.64	\$95.61	\$171.92	\$140.37	108.58	90.59	116.67	101.74
73	321.79	222.94	\$229.03	\$202.86	N/A	N/A	\$123.15	\$101.31	\$181.68	\$148.92	108.58	90.59	116.67	101.74
74	363.12	249.04	\$236.99	\$212.46	N/A	N/A	\$129.67	\$107.00	\$191.45	\$157.46	108.58	90.59	116.67	101.74
75	409.67	278.29	\$245.12	\$223.29	N/A	N/A	\$136.17	\$112.69	\$201.21	\$165.99	108.58	90.59	116.67	101.74
76	N/A	N/A	\$254.41	\$231.20	N/A	N/A	\$144.17	\$120.80	\$213.21	\$178.16	108.58	90.59	116.67	101.74
77	N/A	N/A	\$263.79	\$240.27	N/A	N/A	\$152.17	\$128.91	\$225.21	\$190.32	108.58	90.59	116.67	101.74
78	N/A	N/A	\$273.27	\$249.82	N/A	N/A	\$160.17	\$137.03	\$237.21	\$202.49	108.58	90.59	116.67	101.74
79	N/A	N/A	\$284.32	\$259.67	N/A	N/A	\$168.17	\$145.13	\$249.21	\$214.65	108.58	90.59	116.67	101.74
80	N/A	N/A	\$295.82	\$269.64	N/A	N/A	\$176.17	\$153.24	\$261.20	\$226.82	Children can be written up separately or with a parent/guardian policy.	Children can be written up separately or with a parent/guardian policy.	65+ is last banded age	65+ is last banded age
90	N/A	N/A	STDI/\$300 Benefit/30 Elimination/1 Yr				N/A	N/A	N/A	N/A				
91	N/A	N/A	Age Range	Class	1	4	N/A	N/A	N/A	N/A				
92	N/A	N/A	18-29	Male	\$6.20	\$15.65	N/A	N/A	N/A	N/A				
93	N/A	N/A	18-29	Female	\$10.21	\$15.65	N/A	N/A	N/A	N/A				
94	N/A	N/A	30-35	Male	6.25-665	16.1-18.84	N/A	N/A	N/A	N/A				
95	N/A	N/A	30-35	Female	10.44-11.25	22.09-26-35	N/A	N/A	N/A	N/A				
96	N/A	N/A	35-40	Male			N/A	N/A	N/A	N/A				
97	N/A	N/A	35-40	Female			N/A	N/A	N/A	N/A				
98	N/A	N/A	40-45	Male	7.68-9.19	23.11-28.79	N/A	N/A	N/A	N/A				
99	N/A	N/A	40-45	Female	12.18-13.97	31.84-37.78	N/A	N/A	N/A	N/A				
100	N/A	N/A	45-50	Male			N/A	N/A	N/A	N/A				
			45-50	Female										
			50-55	Male	11.10-13.94	35.81-44.39								
			50-55	Female	16.21-18.15	42.92-47.36								
			55-60	Male										
			55-60	Female										
			60-65	Male	16.98-21.55	52.66-60.19								
			60-65	Female	19.25-20.35	49.86-52.41								

GIFE Premiums per \$1000 document is where got factor from. Took the Special Monthly Premium factor x 10 for \$10K premium. Then, simply Multiplied the \$10K rate by 1.5 for the \$15K premium. (TX,OK,KS,MO,AR,LA)

Effective: 8/21/22

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Effective: 8/21/22

Auto Leads

Prospect Name

Current Carrier

[illegible]

FIRE Leads

Prospect Name

Current Carrier

[illegible]

Life Leads

Prospect Name

Current Carrier

[illegible]

Health Leads

Prospect Name

Current Carrier

[illegible]

Bank Leads

Prospect Name

Current Carrier

[illegible]