

Open Door Appointments, Inc.

Service Agreement

Open Door Appointments, Inc. agrees to supply _____ leads or appointments for the amount of \$ _____

- 1) Open Door Appointments, Inc. will deliver 3-5 leads or appointments per week, or as requested by the agent.
- 2) No customers will be contacted on or after 9 pm or before 8 am local time, including weekends.
- 3) This contract will be in effect 7 business days after we receive payment from _____
Licensed state(s) _____ / _____ / _____ / _____ / _____
Zip Code(s) _____ / _____ / _____ / _____ / _____
- 4) Your area is within a 30-mile radius of the Zip codes you provide us and in accordance with Federal Do Not Call requirements. Territory Plan: 50-miles, 100-miles, 150-miles, 200-miles, 250-miles, 300-miles.

Our Customer service department will contact you to:

- 1) Request a short biography about you and/or your agency to assist our appointment setting specialists.
- 2) Explain how the Company works for you and how to maximize your productivity while using our service.
- 3) Gather information to build your file, including: primary and a back up phone numbers for your company, name, business address, email, carriers appointed, products and services, schedule and the zip codes of your requested territory.
- 4) We will also ask you exactly how you want to be represented by our telemarketing staff.

Open Door Appointments, Inc. requires a weekly report from you:

- 1) A complete weekly disposition report: A summary of what happened on each lead or appointment with the client that originated from the company.
- 2) Please note: It is VERY important that both are to be emailed in on the preceding Friday, as not to delay your leads or setting appointments for the following week.

Open Door Appointments, Inc. appointment setting criteria is as follows:

- 1) Age criteria for preset appointments set by the company will fall in the range of 50 to 75 years of age verified by date of birth, you pick the ages you want.
- 2) We provide all appointments one day in advance. Please do not call to confirm your appointments as we have double verified them for you.

Leads or Appointments:

- 1) Some of our leads or preset appointments convert into "Investment Portfolio Reviews". This means that we have identified an asset, presented the Annuity concept and set the appointment.
- 2) There are only 2 ways an appointment is an appointment: 1: You make the presentation and make the sale. 2: You make the presentation, and they don't do the business with you.
- 3) Any referral that does not result in a presentation will be replaced with a new lead or appointment.
- 4) All contacts must be reported to us in your weekly disposition reports as well as your weekly activity. You will receive the mailers or mailers list from the company, if appointments cannot be attained. **Open Door Appointments, Inc.** will provide you the names and address of Mail Pieces to send out (5-10 per week) with prospects that have expressed interest or we have been in contact with. You will be given tidbit information that will remind them of the previous contacts with callback dates. Telemarketer will inform you if this applies to you.

Print Full Name: _____ (Print Name Here)

AGREED TO BY: _____ (Agent Signs Here)

DATE: _____ (Fill in Date) Your Account Representative: _____

Make check out to:

Open Door Appointments, Inc.
7253 Watson Rd #1070
Saint Louis MO 63119

Phone: 1-888-782-9997

Email: info@opendoorappointments.com

Company Name _____

Company Address _____

City _____ State _____ Zip Code _____

Office Phone _____

Cell Phone _____

E-Mail _____ Website _____

Agent Name _____ Phone _____

Agent Name _____ Phone _____

Agent Name _____ Phone _____

Carriers Appointed _____

Products & Services _____

Territory Plans for the Zip Code(s) within a 30-miles, 50-miles, 100-miles, 150-miles, 200-miles, 300-miles, or Statewide.

Zip Code(s) _____ / _____ / _____ / _____ / _____

Zip Code(s) _____ / _____ / _____ / _____ / _____

Zip Code(s) _____ / _____ / _____ / _____ / _____

Zip Code(s) _____ / _____ / _____ / _____ / _____

Schedule Requested _____

Tue AM _____ / _____ Tue PM _____ / _____

Wed AM _____ / _____ Wed PM _____ / _____

Thu AM _____ / _____ Thu PM _____ / _____

Fri AM _____ / _____ Fri PM _____ / _____

Start Date _____ **Value of Policy** _____ **Age Range** _____

Comments _____

Three Line Bio of How you want to be introduced to your new clients. (Associates and ABC's ex: (CLU, CFP etc.)

Advise us by email with your tracking number so we can reserve your territory: info@opendoorappointments.com