



ELITE SETTING CO., LLC

EST. 2020

Thank you for subscribing to our appointment setting service! We are excited about the opportunity to be a valuable partner to your success. Our schedulers are considered the best trained and most highly qualified in the industry. They go through rigorous sales trainings and product trainings throughout the entire year to better serve you, our client. Please read the information below, and follow the instructions listed to complete your set up, and to get your appointments rolling in.

Thank you!

Pricing

Elite Setting Co., LLC requires a \$50 deposit prior to processing your request for our scheduling services which will be charged when submitting your scheduling request online. Your deposit will be applied to the cost of your appointments on the final invoice that is sent each Friday. The different appointment types have different pricing levels based on difficulty and time expected to schedule your appointments. Medicare and T-65 are \$29, and life insurance/FEX appointments are \$31.25. Discounts are available to Heartland Financial Group, Inc contracted agents. We price based on scheduled appointments, not kept appointments. Because of this, we are discounted compared to other setting companies that charge by kept. You should expect no-shows when appointments are booked over the phone, whether it's by us or you. We confirm the date and time of the appointment at minimum of 3 times before our schedulers hang up the phone with your prospect. Even by doing so, we still expect round a 25% no-show rate.

Payment

Each Friday, you will be sent an invoice via email for our services. You will see the total amount charged based on the number of appointments set for the week. Your deposit will be credited on the invoice, and you will be charged the difference. We expect payment to be made within 3 business day of the invoice date, unless arrangements were made with Elite Setting Co, LLC prior to the appointments being booked for the week. We will not book appointments for the next week until we

receive payment in full for the previous week. When paying your invoice, if you choose to pay by credit or with debit card you will be charged a 2% fee in addition to your appointment cost. However, if you choose to pay via bank ach, you will not be charged an additional fee beyond your appointment totals.

Refund

Elite Setting Co, LLC will refund your deposit should we not be able to schedule at minimum 20% of the direct mail "A Leads" that we are sent. Once we receive the leads, we must have a minimum of two full calendar weeks to attempt to get to the 20% set rate. The only stipulation is that your availability must allow for us to schedule that many appointments for you. Therefore, we must have at least 8 business days with a minimum for 4 hours each day of calendar availability to schedule you the 20% minimum before we issue a refund. That means that if we schedule only 19% of your "A leads" there would be no charge for our services and a refund would be issued. We are confident in our ability to schedule for you; however, we do understand that you invested money into your leads, and your goal, as well as our goal, is to maximize your return. We understand that most appointment setting companies would not offer a guarantee for their services, we feel this confirms our commitment to excellence, and to our partnership together. Therefore, we are glad to offer you peace of mind in return for you doing business with us.

Accepted Lead Types

Currently, we are accepting direct mail, fresh social media leads, and Medicare Center leads. We are willing to also call on "B leads" that are less than 1 year old, and still compliant (i.e., meeting CMS marketing guidelines and consent to contact rules). "B leads" are allowed to account for 20% of your weekly lead total that you send to us. The appointments we set off the "B leads" do count towards our 20% minimum guarantee, however the total number of leads are only calculated based off of "A leads" received.

Example: 30 "A Leads" = 6 Additional "B Leads". Total of 36 leads will be called. Our minimum guarantee is 6 appointments based on the 20% of the 30 "A leads" received.

Minimum Leads

We do require a minimum of 20 “A leads” each week that we call for you. We classify an “A lead” as a lead that is less than 30 days old, and no contact has been attempted. We are trusting the information that you provide to us regarding your leads. However, if we determine that the leads are beyond the 30-day limit for “A leads”, we will immediately cease calling for you. Please do not make this an issue.

Call Recording and Compliance

All calls with your prospects will be recorded and available for your listening, upon your request, for 30 days after the appointment is set. Due to compliance regulations, we will use our approved appointment setting scripts. We will use your name, or your agencies name (whichever you prefer) during the setting process. Slight variations to non-critical parts of our setting script may be made upon request but are not preferred. We will also record the SOA when requested by you.

The Process

Upon completing the information questionnaire, uploading your lead piece copy for approval, and paying your deposit on our website, you will be contacted by our office staff to set up your profile and start putting your success plan together. We will walk you through the process of getting your leads to us, setting up your calendar so that we may begin scheduling, and answering any questions that you may have. After your initial phone call with us, you will then receive a text message from your designated scheduler with their name and contact information. Thank you for choosing Elite Setting Co, LLC for your appointment setting services. We look forward to serving you!

Additional Service

We also have available to you our Virtual Assistant service. This service allows you to use our company to assist in scheduling reviews and follow-ups with your existing book of business. Basically, we help you manage your existing clients base while you work hard to expand it. These services are for agents with over 250 active clients. We charge \$7 per appointment booked with your existing clients. For larger books of business, we do offer monthly pricing. Please feel free to reach out for a quote on our monthly pricing program.