



THE PT SERVICES GROUP®

BUSINESS INTELLIGENCE REPORT + APPOINTMENT SUMMARY

CPA ALLIANCE APPOINTMENT SETTING PROGRAM

Company:	Stienbell & Lockey, CPA	Website:	www.stienbelllockey.com
Prospect Name:	William Lockey	Email:	bill@stienbelllockey.com
Title:	Owner	Telephone:	860-555-1212
Address:	123 Any Street	Alt-Phone #:	860-555-1313 (cell)
Address2:	Suite 525	Appt. Number:	123-1234
City:	Stamford	Client Name:	James Burks
State:	CT	Produced By:	Ronald Dixon
Zip:	06902	Produced Date:	June 1st
County:	Fairfield	Appt. Date:	June 8th
		Appt. Time:	8:00 AM
Meeting Location:	Same as above		

Information Provided by List Source

Type of Business:	Accounting, Auditing, and Bookkeeping	Plan Asset Size:	\$1,000,000
Year Established:	1990	Number of Employees:	11

Information Gathered by The PT Services Group

Number of owners/partners:	2
Number of accountants at the firm:	8
They have been a CPA for:	26 years
They specialize in the following markets:	Tax accounting
Licensed to sell Insurance/Securities:	No

Additional Comments:

You will be meeting with Williams Lockey to discuss the features and benefits associated with the integration of financial services into his practice. Bill told me, "I get these calls pretty frequently." After hearing your experience and qualifications, he agreed to meet and learn more about the many advantages an alliance can provide.