



THE PT SERVICES GROUP®

BUSINESS INTELLIGENCE REPORT

RETIREMENT PLANNING

Lead Number: 12-1234 **Date:** March 5th

Contact Data

Decision Maker: Joe Morrison **Phone:** 319-555-1212
Title: Owner **Email:** J.morrison@homeimprove.com

Company Data

Company Name: County Home Improvement **Address:** 5150 Michelli Road
Year Started: 1955
Number of Employees: 30 **City:** Waterloo
Website: www.CHIBuilders.com **State:** Iowa
Type of Business: Siding Contractor and Remodeling **Zip:** 50703
County: Blackhawk

Lead Detail

Sales Volume: \$4,000,000
Company Structure: S Corp
Sole Owner: No
How Many Partners: 7
Age/Age of Partners: Joe is 52; partners ages range from 45 to 70
Key Employees: 3
Positions They Hold: Field Managers
Family Members Involved: Yes
Which Family Members: Joe and his father
Retirement Plan: Yes
Type of Retirement Plan: 401(k)
Buy/Sell Agreement: Yes
Greatest Concern: Finding and keeping good people