



EXECUTIVE COMPENSATION APPOINTMENT SETTING PROGRAM

Company:	OMD Products, Inc	Website:	www.omidpro.com
Prospect Name:	Libby Cohn	Email:	cohn@omidpro.com
Title:	President	Telephone:	501-555-1212
Address	123 Any Street	Alt-Phone #:	501-555-9999 (cell)
Address2:		Appt. Number:	123-1234
City	Little Rock	Client Name:	Aaron Drake
State	AR	Produced By:	Lisa O'Donnell
Zip	72212	Produced Date:	March 12th
County	Pulaski	Appt. Date:	March 18th
Meeting Location	Same as above	Appt. Time:	11:00 AM

Information Provided By List Source

Type of Business:	Manufacturing	Sales Volume:	\$3,500,000
Year Established:	1987	Number of Employees:	33

Information Gathered by The PT Services Group

Company Structure:	C Corp
Number of partners/owners:	3 others
Age of prospect: (approximate age of partners)	46; partners range from 40-52
They consider their business a family business:	Yes
The family members involved are:	Brother
Currently has a retirement plan:	Yes
Type of plan:	401(k)
Currently has a buy/sell agreement in place:	Yes
Key employees:	Yes
Positions the hold:	Managers

Additional Comments:

You will be meeting with Libby Cohn to discuss executive compensation plans. Libby has three partners but she is the majority owner. Last year's sales volume was verified at \$3.5 million. The business has 33 employees with a handful of people she considers "key." She is interested in the tax benefits these plans can offer and the ability to provide an additional benefit for her key employees.