



PROPERTY & CASUALTY APPOINTMENT SETTING PROGRAM

Company:	Stay Bell Construction	Website:	www.sbconstruction.com
Prospect Name:	Michael Zimba	Email:	m.zimba@sbconstruction.com
Title:	CFO	Telephone:	502-555-1212
Address	123 Any Street	Alt-Phone #:	502-555-9999 (cell)
Address2:	Suite 525	Appt. Number:	123-1234
City	Lexington	Client Name:	Paul Murray
State	KY	Produced By:	Amanda Sengbur
Zip	40502	Produced Date:	March 15th
County	Fayette	Appt. Date:	March 20th
Meeting Location	Same as above	Appt. Time:	9:30 AM

Information Provided By List Source

Type of Business:	Construction	Sales Volume:	\$11,700,000
Year Established:	1964	Number of Employees:	7

Information Gathered by The PT Services Group

The workers' compensation coverage is with:	State Farm
Their agent is:	Jones Insurance
Their annual premium is:	\$18,000
Their workers' compensation renews:	March
Their claims activity has been:	Infrequent
Their workplace safety program is state certified:	Unsure
Their general liability coverage is with:	State Farm
Their agent is:	Jones Insurance
Their relationship with their broker is:	Fair
Anything preventing them from changing brokers:	No
Their annual premium is:	\$20,000
Their general liability coverage renews:	March
Their total business insurance premium:	\$38,000

Additional Comments:

You will be meeting with Michael Zimba, who has been with the company for 15 years. He stated at the outset that they had a bad experience with a broker a few years ago; they provided all of the pertinent information but never received a quote. This experience has made them a little "gun-shy" about shopping around. He did agree to take a look at what you can offer.