
PROSPECT INFORMATION FORM

Date: _____

Contact Name: _____

Company Name: _____

How long have they been in business? _____ Incorporated? YES NO

Phone #: _____ Location? _____

Email Address: _____

IMPORTANT INFO

What services do they provide? _____

Who are they billing? _____

How much are they billing a month? _____

Notes: _____

BROKER CONTACT INFO: _____
