



DATE: _____

LEADGEN: _____

Hi (PROSPECTS NAME), this is (YOUR NAME) with WCT Insurance Agency. We sent you a quote about 6 months ago and since then the majority of our 40 carriers have had VERY LARGE rate decreases. I just need to pull your info and go over some additional discounts that you qualify for. What is the correct spelling of your first and last name as it appears on your drivers license?

NAME: _____

EMAIL: _____

ADDRESS: _____ OWN RENT

CITY: _____ ZIP: _____ PHONE: _____ MOBILE LANDLINE

AUTOS:

| YEAR | MAKE | MODEL | COVERAGE | |
|------|------|-------|---------------|-----------|
| | | | FULL COVERAGE | LIABILITY |
| | | | FULL COVERAGE | LIABILITY |
| | | | FULL COVERAGE | LIABILITY |
| | | | FULL COVERAGE | LIABILITY |

WHO ARE THE DRIVERS ON THE POLICY & ARE THEY ALL LICENSED DRIVERS?

| NAME - SPOUSE/CHILD/PARENT | MARRIED OR SINGLE | DOB | DRIVERS LICENSE NUMBER |
|----------------------------|-------------------|-----|------------------------|
| | | | |
| | | | |
| | | | |
| | | | |

HOME:

HOME AND AUTO BUNDLED: ROOF REPLACED: _____ HOW LONG HAVE YOU LIVED THERE: _____

PAYMENTS ARE MADE: MORTGAGE SELF PAY MONTHLY SELF PAY IN FULL

(PROSPECT NAME), thank you for your time! I will have a licensed sales agent follow up with you to discuss some of the different coverage and money saving options.

IS IT OKAY TO CONTACT YOU WITH THIS INFORMATION VIA EMAIL AS WELL AS TEXT?

OKAY TO CALL/TXT/EMAIL: YES NO