

## Lead Worksheet

Below is the critical information the advisors need for following up on a Chambers Plan lead. The more information you can provide, the better prepared the local advisor will be when contacting the lead. Our usual turnaround on a lead follow-up is 24 hours.

Date:	Time of contact:
Contact Name:	
Company Name:	
Phone:	Postal Code:
Email:	
Number of Employees:	Currently have benefits (circle one): YES                      NO

Other information or special instructions:

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**Please send to:**

**Pamela Brace**

**1-866-421-1110 ext. 104**

[pam@prteam.ca](mailto:pam@prteam.ca)

**INTERNAL USE ONLY:**

Date received:	Date sent:
Assigned to Advisor:	