



custom report prepared for

Test Company, LLC

Represents data 12/01/2016 through 05/14/2017

Appointments Set Report

Appointments (Set & Kept)

All Marketing Leads	31
Number of Set Appointments	26
Number of Kept Appointments	18
% of All Leads that Set Appt	84%
% of Set Appts that Kept Appt	69%

--

Appointments (Set & Kept), By Advisor

Advisor	All Leads	Num Set	Num Kept	All that Set	% of Set that Kept
John Smith	11	9	6	82%	67%
Erica Pauly	10	9	7	90%	78%
Flash Gordon	10	8	5	80%	63%

John Smith

Erica Pauly

Flash Gordon

Appointments (Set & Kept), By Source

Source	All Leads	Num Set	Num Kept	All that Set	Set that Kept
referral	27	23	16	85%	70%
personal	1	1	1	100%	100%
style ad	1	1	0	100%	0%
radio	1	1	1	100%	100%

Source	All Leads	Num Set	Num Kept	All that Set	Set that Kept
lunch n learn	1	0	0	0%	25%

referral

personal

style ad

radio

lunch n learn

Appointments (Set & Kept), By Seminar

Seminar	All Leads	Num Set	Num Kept	All that Set	Set that Kept
Retirement Today - 12/07/2016	15	11	8	73%	73%
Retirement Today - 12/14/2016	6	6	3	100%	50%
Retire Well - 12/07/2016	8	8	6	100%	75%
Retire Well - 12/23/2016	2	1	1	50%	100%

Retirement Today - 12/07/2016

Retirement Today - 12/14/2016

Retire Well - 12/07/2016

Retire Well - 12/23/2016

Amount Written Report

Total Amount Written

Month	FIA	AUM	Life	Total
December	\$9,876.50	\$13,459.90	\$16,250.00	\$39,586.40
January	\$11,004.50	\$12,507.50	\$15,000.00	\$38,512.00
Total	\$20,881.00	\$25,967.40	\$31,250.00	\$78,098.40

Total Amount Written, By Advisor

John Smith				
Month	FIA	AUM	Life	Total
December	\$3,950.60	\$5,383.96	\$6,500.00	\$15,834.56
January	\$3,301.35	\$3,752.25	\$4,500.00	\$11,553.60
Total	\$7,251.95	\$9,136.21	\$11,000.00	\$27,388.16

Erica Pauly				
Month	FIA	AUM	Life	Total
December	\$2,962.95	\$4,037.97	\$4,875.00	\$11,875.92
January	\$4,401.80	\$5,003.00	\$6,000.00	\$15,404.80
Total	\$7,364.75	\$9,040.97	\$10,875.00	\$27,280.72

Flash Gordon				
Month	FIA	AUM	Life	Total
December	\$2,962.95	\$4,037.97	\$4,875.00	\$11,875.92
January	\$3,301.35	\$3,752.25	\$4,500.00	\$11,553.60
Total	\$6,264.30	\$7,790.22	\$9,375.00	\$23,429.52

Total Amount Written, By Week

Week	FIA	AUM	Life	Total
11/27/2016 - 12/03/2016	\$0.00	\$0.00	\$0.00	\$0.00
12/04/2016 - 12/10/2016	\$0.00	\$0.00	\$0.00	\$0.00

Week	FIA	AUM	Life	Total
12/11/2016 - 12/17/2016	\$0.00	\$0.00	\$0.00	\$0.00
12/18/2016 - 12/24/2016	\$0.00	\$0.00	\$0.00	\$0.00
12/25/2016 - 12/31/2016	\$9,876.50	\$13,459.90	\$16,250.00	\$39,586.40
01/01/2017 - 01/07/2017	\$11,004.50	\$12,507.50	\$15,000.00	\$38,512.00
01/08/2017 - 01/14/2017	\$0.00	\$0.00	\$0.00	\$0.00
01/15/2017 - 01/21/2017	\$0.00	\$0.00	\$0.00	\$0.00
01/22/2017 - 01/28/2017	\$0.00	\$0.00	\$0.00	\$0.00
01/29/2017 - 02/04/2017	\$0.00	\$0.00	\$0.00	\$0.00
02/05/2017 - 02/11/2017	\$0.00	\$0.00	\$0.00	\$0.00
02/12/2017 - 02/18/2017	\$0.00	\$0.00	\$0.00	\$0.00
02/19/2017 - 02/25/2017	\$0.00	\$0.00	\$0.00	\$0.00
02/26/2017 - 03/04/2017	\$0.00	\$0.00	\$0.00	\$0.00
03/05/2017 - 03/11/2017	\$0.00	\$0.00	\$0.00	\$0.00
03/12/2017 - 03/18/2017	\$0.00	\$0.00	\$0.00	\$0.00
03/19/2017 - 03/25/2017	\$0.00	\$0.00	\$0.00	\$0.00
03/26/2017 - 04/01/2017	\$0.00	\$0.00	\$0.00	\$0.00
04/02/2017 - 04/08/2017	\$0.00	\$0.00	\$0.00	\$0.00
04/09/2017 - 04/15/2017	\$0.00	\$0.00	\$0.00	\$0.00
04/16/2017 - 04/22/2017	\$0.00	\$0.00	\$0.00	\$0.00
04/23/2017 - 04/29/2017	\$0.00	\$0.00	\$0.00	\$0.00
04/30/2017 - 05/06/2017	\$0.00	\$0.00	\$0.00	\$0.00
05/07/2017 - 05/13/2017	\$0.00	\$0.00	\$0.00	\$0.00

Amount Pending Report

Total Amount Pending

Total	\$6,151.50
-------	------------

Total Amount Pending, By Advisor

Advisor	Total
Erica Pauly	\$2,962.95
John Smith	\$3,188.55

Issued Business Report

Total Amount Issued

FIA Amount Issued	AUM Amount Invested	Total
\$22,692.00	\$30,000.00	\$52,692.00

Total Amount Issued, By Source

Source	FIA Amount Issued	AUM Amount Invested	Total
referral	\$3,164.00	\$4,350.00	\$7,514.00
lunch n learn	\$1,650.00	\$3,000.00	\$4,650.00
personal	\$6,328.00	\$7,250.00	\$13,578.00
style ad	\$1,650.00	\$3,100.00	\$4,750.00
radio	\$9,900.00	\$9,300.00	\$19,200.00
college course	\$0.00	\$3,000.00	\$3,000.00

Total Amount Issued, By Week

Week	FIA Amount Issued	AUM Amount Invested	Total
11/27/2016 - 12/03/2016	\$0.00	\$0.00	\$0.00
12/04/2016 - 12/10/2016	\$0.00	\$0.00	\$0.00
12/11/2016 - 12/17/2016	\$0.00	\$0.00	\$0.00
12/18/2016 - 12/24/2016	\$0.00	\$0.00	\$0.00
12/25/2016 - 12/31/2016	\$0.00	\$0.00	\$0.00
01/01/2017 - 01/07/2017	\$22,692.00	\$30,000.00	\$52,692.00
01/08/2017 - 01/14/2017	\$0.00	\$0.00	\$0.00
01/15/2017 - 01/21/2017	\$0.00	\$0.00	\$0.00
01/22/2017 - 01/28/2017	\$0.00	\$0.00	\$0.00
01/29/2017 - 02/04/2017	\$0.00	\$0.00	\$0.00
02/05/2017 - 02/11/2017	\$0.00	\$0.00	\$0.00
02/12/2017 - 02/18/2017	\$0.00	\$0.00	\$0.00
02/19/2017 - 02/25/2017	\$0.00	\$0.00	\$0.00
02/26/2017 - 03/04/2017	\$0.00	\$0.00	\$0.00

03/05/2017 - 03/11/2017	\$0.00	\$0.00	\$0.00
Week	FIA Amount Issued	AUM Amount Invested	Total
03/12/2017 - 03/18/2017	\$0.00	\$0.00	\$0.00
03/19/2017 - 03/25/2017	\$0.00	\$0.00	\$0.00
03/26/2017 - 04/01/2017	\$0.00	\$0.00	\$0.00
04/02/2017 - 04/08/2017	\$0.00	\$0.00	\$0.00
04/09/2017 - 04/15/2017	\$0.00	\$0.00	\$0.00
04/16/2017 - 04/22/2017	\$0.00	\$0.00	\$0.00
04/23/2017 - 04/29/2017	\$0.00	\$0.00	\$0.00
04/30/2017 - 05/06/2017	\$0.00	\$0.00	\$0.00
05/07/2017 - 05/13/2017	\$0.00	\$0.00	\$0.00

Seminar Business Report

Total Amount Written

Month	FIA	AUM	Life	Total
January	\$11,004.50	\$12,507.50	\$15,000.00	\$38,512.00
December	\$9,876.50	\$13,459.90	\$16,250.00	\$39,586.40
Total	\$20,881.00	\$25,967.40	\$31,250.00	\$78,098.40

Total Amount Written, By Seminar

Retire Well - 12/05/2016

Month	FIA	AUM	Life	Total
January	\$5,502.25	\$6,253.75	\$7,500.00	\$19,256.00
Total	\$5,502.25	\$6,253.75	\$7,500.00	\$19,256.00

Retirement Today - 12/07/2016

Month	FIA	AUM	Life	Total
December	\$4,938.25	\$6,729.95	\$8,125.00	\$19,793.20
Total	\$4,938.25	\$6,729.95	\$8,125.00	\$19,793.20

Retire Well - 12/22/2016

Month	FIA	AUM	Life	Total
January	\$5,502.25	\$6,253.75	\$7,500.00	\$19,256.00
Total	\$5,502.25	\$6,253.75	\$7,500.00	\$19,256.00

Retirement Today - 12/28/2016

Month	FIA	AUM	Life	Total
December	\$4,938.25	\$6,729.95	\$8,125.00	\$19,793.20
Total	\$4,938.25	\$6,729.95	\$8,125.00	\$19,793.20