



**DIRECT MAIL LEAD GENERATION PROGRAM - PROGRAM INFORMATION**

**HOW DOES THE PROGRAM WORK?**

We developed this program specifically to be able to provide direct mail leads to our agents consistently at a fixed cost. In order to be able to do that, we require you to have a balance of 2.5 weeks' lead credits at all times and provide us with a two-week cancellation notice. If you want 10 leads per week, your 25-lead credit balance is charged upfront as a deposit and those credits will not be used until your two-week cancellation notice is activated in writing. Once you have made your initial deposit, you will be charged for the leads as they come in. Please see the chart for a sample summary:

Date (charged or sent)	Amount Charged	Credits Today	Previous Credits	Credits Used	Credits Balanced	Notes:
October 1	\$931.50	25	0	-	25	
October 23			25	4	21	
October 24			21	1	20	
October 25			20	4	16	
October 26			16	1	15	
October 27	\$372.60	10	15	-	25	Friday
October 30			25	5	20	

This system has worked very well for us and our agents! It's the least expensive and most productive way to ensure that our agents have the amount of leads that they want consistently!

**WHAT TO EXPECT FROM THE PROGRAM:**

- Weekly mailing to generate your desired number of leads until you provide a two-week cancellation notice.
- Please allow 3-4 weeks for leads to come in for your initial order.
- 24/7 Access to log in to your lead portal.
- Quality fresh leads specifically generated for you.

**WHAT WE NEED FROM YOU:**

- Credit Card Order/Invoice Form
- A Copy of the Above Credit Card (front and back)
- A Copy of Your Drivers' License.
- Territory/Zip Code Form



**DIRECT MAIL LEAD GENERATION PROGRAM - LEAD INFORMATION**

A lead card that is partially or fully filled out upon return is considered a lead. This includes a name, spouse’s name, age, and phone number, as well as any correction to the address or acknowledgement of address. These responses are specifically requesting and waiting for you to contact them.

**WHAT CRITERIA IS USED FOR THE MAILING?**

Ages: 50 – 83

Annual Income: \$15 - \$60,000

**LEADS to Choose From**

- 1. National \$36 Lead Average – Rates will vary by Geography

<b>T-2</b>	<b>NEW SUPPLEMENTAL BENEFIT UPDATE FOR CONNECTICUT CITIZENS</b> <b>For faster service, complete and return the information below.</b>	<b>2023</b>
<input type="checkbox"/> YES, the following contact info is accurate.		STREET ADDRESS ▶ <small>(No P.O. Boxes)</small>
NAME ▶	AGE ▶	_____
SPOUSE'S NAME ▶	AGE ▶	PHONE ▶ (     ) - _____
<small>Not affiliated with or endorsed by any government agency.</small>		<small>As a resident of Connecticut you are entitled to more benefits not provided by government funds.</small> <small>You now have access to a 2023 state-regulated life insurance program which will pay 100% of all final expenses up to \$35,000.</small> <small>Return this postage paid card within 5 days to request this new benefit information.</small>
<b>Please Respond Within 5 Days</b>		
<small>To opt-out of future mailings, please visit <a href="http://dmn-optout.com">dmn-optout.com</a> and enter this code:</small>		<small>FES2EL1CT-04</small>



**DIRECT MAIL LEAD GENERATION PROGRAM - LEAD CREDIT ORDER /INVOICE**

By your hand, with your signature on this form, authorizes Shoreline Financial Group to charge lead credits to the specified credit card. Once charged, SFG will fax an invoice showing credits paid for and SFG will initiate direct mailers to fulfill your order. As mail responses are received, they will be put into a web portal for you to access.

It is understood by you that SFG is not in the ‘lead for profit’ business and credit card use is provided as a convenient payment method for you, to allow you to market products and services made available to you through SFG only. *(Defined as insurance carriers and/or other entities that we are jointly contracted with).* These leads will be exclusive to you for 6 months.

To ensure mailing and priority leads, SFG will charge your credit card once in the amount of \$931.50.

Then SFG will charge your credit card weekly, to maintain a 25-credit balance in your account. (Please see lead program sample spread sheet). Once on the automatic charging plan, you agree to give SFG 14 day’s written notice prior to charges being stopped. We will try to maintain a steady flow of 10 leads / week. So, the charge on will be approx. \$372.60. Agents can expect a +/- 40% response and should be comfortable accepting that fluctuation in charges. While a desired quantity of leads is requested, we cannot guarantee the exact number each week.

As Such, you your sub-agents reporting to you directly or indirectly (whether as an employee or as an independent contractor) or persons in your employ (collectively referred to as “you”) will use the leads solely for the purpose of marketing products and services through SFG, and you will not, nor will you allow others to, make use of these leads for any other purpose. Should you fail to comply with any of the conditions listed above, we have the right to terminate your access to leads, terminate your contracts with all carriers SFG represents, and recover from you all commissions earned from sales made from leads and placed with other insurers, plus any and all legal fees that may be incurred. Any legal disputes will be settled under state of Connecticut law.

I do hereby attest that the information, given by me and the listed above, is true and valid and any intentional misrepresentation or falsification on my part will jeopardize my continued participation in SFG lead program.

Number of Credits this purchase:   25                        Charge   \$931.50    
 (Cost per credit = \$36.00 +3.5% trans fee)

Please circle:              Visa              Master Card

\_\_\_\_\_  
 Card Number                                              SVC Code                                              Expiration date

\_\_\_\_\_  
 Name Appearing on Card                                              Daytime phone number

\_\_\_\_\_  
 Address Appearing on Credit Card Bill                                              City, State, Zip

\_\_\_\_\_  
 Printed Name                                              Signature                                              Date

**You Must Attach: A Copy of the Above Credit Card, (front and back) and A Copy of Your Drivers’ License. Lead cost subject to change. If changed, SFG will notify you prior to charging your credit card and will provide you with a new agreement reflecting change.**



**DIRECT MAIL LEAD GENERATION PROGRAM - TERRITORY/ZIP CODE FORM**

Please return this completed form along with the order form, copy of your driver's license, and a copy of the credit card being used (front and back) via fax to 860-552-4119 or via email to [cspaz7@gmail.com](mailto:cspaz7@gmail.com). Please contact us at 1-860-552-4774 with any questions!

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Counties in order of Preference

State: \_\_\_\_\_

- |          |          |
|----------|----------|
| 1. _____ | 2. _____ |
| 3. _____ | 4. _____ |
| 5. _____ | 6. _____ |

Counties in order of Preference

State: \_\_\_\_\_

- |          |          |
|----------|----------|
| 1. _____ | 2. _____ |
| 3. _____ | 4. _____ |
| 5. _____ | 6. _____ |

Please note: Lead territories are assigned on a first come, first served basis and NO territories are guaranteed.