

Date	Retired	Contact	Meeting	Note 1	Note 2	Note 3	Note 4	Note 5
2-Nov	Y	N	N	Called and emailed on 11/2	called again on 11/4	texted on 11/15	called on 2/15	called on 3/8 and 5/3
3-Nov	N	Y	Y	Called and emailed on 11/3	Called on 11/4 again, home phone?	called and emailed again the week of 2/2/21		emailed on 6/6/22 and called
3-Nov	N	Y	N	Called and emailed on 11/3	Called on 11/4 again	texted on 11/15	text saying not interested	
5-Nov	N	Y	Y	called and emailed on 11/5	Wants follow up call on 11/10, had a very	called Steve on 1/5/2021 to follow up.	called on 2/15 to follow up	Steve called on 3/8 to say he was still interested
7-Nov	N	N	N	called and emailed on 11/7	google voice, but sent text	called again on 2/15	called on 3/8/22	voicemail on 5/3
10-Nov	N	N	N	called and emailed on 11/10	texted on 11/15	called again on 2/15	voicemail on 5/3	called on 9/28
10-Nov	N	Y	N	called on 11/10, spoke with briefly, said I would send an email	1 or 2 years from retirement, 9mm opportunity.	called again on 2/15	voicemail on 5/3	called on 8/8 and 9/28
11-Nov	Y	N	N	called and emailed on 11/11	called and texted on 11/15	called again on 2/15	called on 5/9	called again on 9/28
1-Dec	N	Y	Y	had a brief call, was busy, followed up with an email	called on 12/14	called again on 2/15, wants a call on 2/16	called again on 5/3, spoke with for a few minutes.	
2-Dec	N	N	N	emailed and called	called on 12/14	called on 2/15	texted on 5/9	number no longer works
2-Dec	N	Y	N	had a brief call, was busy, followed up with an email, seemed	called again on 2/1/22	called again on 2/15	texted on 5/9, not interested in reply	
3-Dec	N	Y	N	Over \$5mm. Called and emailed	called on 12/14	texted on 5/9	voicemail full on 9/28	
3-Dec	N	Y	N	emailed and called	emailed back, wants individual bond management	Not interested		
3-Dec	N	N	N	emailed and called	called on 12/14	called on 2/15	texted on 5/9	called on 9/28 and sent email
3-Dec	N	Y	N	emailed and called	called on 12/14	called on 2/15	spoke with briefly on 5/9. At eastern bank wealth	
4-Dec	N	Y	N	emailed and called	called on 12/14	called on 2/15	Not interested	
4-Dec	N	Y	N	Had a good convo, scheduled to speak again Monday 12/6.	called on 12/14, playing gold in FL. Still interested.	called on 2/15, said he is sending me portfolio	spoke on 3/22. Follow up at the end of March if I	He wants to be added to a mailing list. He said
5-Dec	N	N	N	emailed and called	called on 12/14	called on 2/15	texted on 5/9	
5-Dec	N	Y	N	emailed and called	Wrote me back via email about flat fees	called on 12/14	called on 2/15	texted on 5/9
6-Dec	Y	Y	N	emailed and called	Spoke with spouse on 12/14. Listened to my wife's			
6-Dec	N	Y	N	emailed and called. Spoke with briefly, seemed uninterested				
1-Jan	N	N	N	Emailed and called	Called again on 1/28, on calendar	called on 2/15	texted on 5/9	email and vmail on 11/2
1-Jan	N	Y	N	Emailed and called	Spoke with on 1/28, said he never entered his name			
1-Jan	N	Y	Y	Emailed and called	spoke with on 1/28, want to connect in early	sent email follow up on 2/3/22 and a call	virtual meeting on 2/19	said to touch base in 2024
1-Jan	Y	Y	N	Emailed and called	called on 2/3	called on 2/15	passed away	
2-Jan	N	Y	N	Emailed and called	Has a few providers, maybe touch base 2023			
2-Jan	N	Y	N	Emailed and called	no voicemail on 1/28	texted on 5/9	number not in service	
2-Jan	Y	Y	N	Emailed and called	Went w/ Vanguard			
2-Jan	Y	Y	Y	Emailed and called	Had a great conversation about his trust	spoke with again on 2/3/22. Was still waiting on	I believe this prospect is likely a scam artist	
4-Jan	N	Y	N	Spoke with for about 30 minutes. Has some real estate questions	Spoke with 1/28.	Sent follow up email to book meeting on 2/4		
4-Jan	N	Y	N	Spoke with for about 30 minutes. Has some real estate questions	Spoke with 1/28.	Sent follow up email to book meeting on 2/4		
4-Jan	Y	N	N	emailed and called. Home phone?	called again on 2/3. Next time try after 5pm	called on 5/9	email and vmail on 11/2	
5-Jan	N	N	N	emailed and called.	called again on 2/3	called on 2/15	texted on 5/9	email and vmail on 11/2
29-Jan	Y	Y	N	looking for flat fee. Light work until he passes. Looking for a	called again on 2/3. Sent follow up email	still interested in working. Thinking about the setup		
1-Feb	N	Y	N	emailed and called	called again on 2/3	Spoke with on 2/18, wanted husband looped in.	left voicemail on 8/8	
1-Feb	Y	N	N	emailed and called	called again on 2/3	Virtual Meeting scheduled for 2/25	touch base late in the summer. Not interested in	
1-Feb	Y	N	N	emailed and called	called again on 2/3	texted on 8/8	email and vmail on 11/2	
9-Feb	N	Y	Y	emailed and called	spoke with on 2/18, semi-retired from nursing.	met with on 2/21. Productive meeting. Still has	texted on 4/4/22	called on 5/3, she is having health issues.
9-Feb	Y	Y	N	emailed and called	Not interested in working with someone	met with on 2/22. Productive meeting. Still has	texted on 4/4/22	called on 5/3, she is having health issues.
9-Feb	N	Y	N	emailed and called	called again on 2/18, left vmail	called on 8/24	followed up with an email text on 5/23	Doug went with JPH but he said to stay in
9-Feb	Y	Y	N	Spoke briefly, wanted an email to go over my background. Said	called and emailed on 2/18	called again on 3/9, spoke with briefly, maybe reach		
10-Feb	N	Y	N	Peter replied to my email, saying he is exploring other advisors.	Reach out in April if you don't hear from him			
10-Feb	Y	Y	N	Snow bird, in Naples until April. Expressed interest in meeting	meeting scheduled for 4/13	\$99k of income, taxes of \$9k. Bonnie has a TIAA	Bonnie went with another firm	
10-Feb	N	Y	N	Spoke with briefly, said he is being pitched by Fisher as	Spoke with on 2/18, he again later	met with on 8/9, he is going with Fisher		
15-Feb	Y	N	N	emailed and called	left another voicemail on 2/18	left voicemail on 5/3	texted on 8/8, landline	vmail and email on 11/2
1-Mar	N	Y	Y	Had a conversation on 3/1, seems interested. Wanted follow up	Had a conversation on 3/7. He was very interested			
1-Mar	N	Y	N	called on 3/1. Owns her own law firm and home. Does not have a	sent a re-intro email on 2/16/23	called ono 6/15	texted on 8/8	
1-Mar	N	N	N	emailed and called	left voicemail on 5/3			
3-Mar	Y	Y	N	Spoke with on 3/3. Strong preference for utilities and income.	texted on 8/8, landline	He wants me to call his wife. Erin 508-250-5664.	spoke with Paul on 5/27 and he is still	texted on 8/15, email and vmail on 11/2
3-Mar	N	Y	N	emailed and called	called on 3/9	texted on 8/8, replied to the text saying she was	texted on 2/16/23	
4-Mar	Y	Y	N	emailed and called	called on 3/9			
4-Mar	N	Y	N	follow up call scheduled for 3/10	He was only looking for access to private funds			
6-Mar	N	Y	N	spoke with on 3/6, didn't seem interested				
5-Mar	Y	N	N	emailed and called	called on 3/9	texted on 8/8	called on 10/11	
6-Mar	N	N	N	emailed and called	called on 3/9	texted on 8/8	called on 1/16	
8-Mar	Y	N	N	emailed and called	called on 3/9	texted on 8/8, also landline		
19-Mar	N	N	N	emailed and called	called again on 3/21	called again on 3/28		
1-Apr	N	Y	Y	emailed and called	4/7, set up a call with Bruce for 4/8	\$3mm invested. Spoke with on 6/15. Touch base	touched base on 8/8, call in late September.	left voicemail on 1/2/23
7-Apr	Y	Y	N	Andrew and his wife are returning after Easter. If I don't hear	attempted to call again on 5/27/21. He is	called on 6/15	voicemail on 8/8	
7-Apr	Y	Y	N	emailed and called, scheduled meeting for 4/13	Maureen Being: mbeuring@gmail.com 617-620			
7-Apr	N	N	N	Emailed and called	called and texted on 4/14	called on 6/15	voicemail on 8/8	
7-Apr	N	Y	N	Not interested, happy w/ current advisor				
7-Apr	Y	N	N	emailed and called	called and texted on 4/14	called on 8/8		
7-Apr	N	N	N	emailed and called				
7-Apr	N	N	N	emailed and called	Called again on 5/3, left voicemail	called on 6/15	voicemail on 8/8	
8-Apr	N	Y	Y	Great intro call, interested in meeting, call by 4/15 if you do not	Spoke briefly on 5/3, still interested. Touch base by	call Tim Sanborn on 5/18 in the AM	Tim called me on 6/13. Grumpy, but wanted to	Met with Tim on 7/14, he provided an etrade
9-Apr	N	Y	N	emailed and called	called and texted on 4/14	voicemail on 5/3	Not interested	
10-Apr	N	Y	N	emailed and called	called and texted on 4/14	voicemail on 5/3	called on 6/4	called, email, voicemail on 11/2
10-Apr	N	N	N	emailed and called	called and texted on 4/14	voicemail on 5/3	called on 6/4	called, email, voicemail on 11/2
14-Apr	N	Y	N	emailed and called (google voice)	called again on 5/10	texted on 8/8	called, email, voicemail on 11/2	seemed like warm on change but very nice.
2-May	Y	Y	N	emailed and called, over \$5mm	texted me back on 5/10, said he would be in touch	texted on 5/26, with calendly link	called on 6/15	
2-May	Y	Y	N	Replied to my email saying he wanted a call on 5/4	Had meeting on 5/9. Seemed interested, sent	Have a tentative call set up for 6/3 to review.	on 7/21 he suggested I circle back at the end of the	
2-May	N	Y	Y	scheduled a call for 4pm Tuesday 5/3, call was postponed. Ping	Called Steve on 6/15	left voicemail on 8/8		
3-May	N	Y	Y	emailed and called	texted and called on 5/10	Maria is interested on when she can retire. Follow		
3-May	Y	N	N	emailed and called	texted and called on 5/10	voicemail on 8/8		
3-May	Y	Y	N	emailed and called	Called me on 5/6, already has a meeting with an	left voicemail on 6/2, she is sticking with her current		
3-May	N	Y	Y	emailed and then called on 5/4. Seemed eager to have a	met back on 5/10/23 that he was staying out after			
4-May	N	Y	N	emailed and called	texted and called on 5/10	Called on 6/2/22, he texted me back to say he	We had a planning meeting on 5/28/22, sent a	spoke with on 6/30, touch base in late July/early
6-May	Y	Y	N	emailed and called	texted and called on 5/10	called on 6/2/22	voicemail left on 8/8	Said he wasn't interested
7-May	N	N	N	emailed and called	texted and called on 5/10	called again on 6/2/22	called on 6/30	called on 11/2, voicemail and email
7-May	N	N	N	emailed and called				
2-Jun	N	Y	N	emailed and called. Larry emailed back on 6/2 to say he would be	Has several health issues. Has about \$1mm in cash.	Called Larry on 8/8	number not in service	
3-Jun	N	N	N	emailed and called	texted on 6/5	number no longer valid		
4-Jun	Y	Y	N	emailed, called, and texted. Voicemail full. Profile says he has	called on 6/8	called on 6/30	Needs a portugese translator 8/28	Not a real prospect
3-Jun	N	Y	N	Spoke with assistant, he provided a business number. Sent an	called on 8/8			
5-Jun	N	N	N	emailed and called. He texted me back, indicated once things	called again on 8/1, left voicemail	called on 8/24	voicemail and email on 11/2	
6-Jun	Y	N	N	Emailed and called	texted Bruce on 6/7	called and voicemail on 8/1	voicemail and email on 11/2	
8-Jun	Y	Y	N	Spoke with him, chatty guy, income focused, also focused on tax				
8-Jun	Y	Y	N	emailed and called, going into surgery but interested in speaking	Wants me to touch base in the middle of July.	called on 8/3, left voicemail	spoke with on 10/7, call later in 2022. Has	
9-Jun	N	Y	Y	emailed and called	Meeting scheduled for 6/28, rescheduled to 6/29	Meeting held on 6/29 and sent proposal on 6/30.	Called on 6/10 to follow up on any questions	
10-Jun	N	N	N	emailed and called	texted on 6/24	voicemail and email on 11/2		
10-Jun	N	Y	Y	emailed and called, replied to my email saying he would be in	Tim has \$22mm - 2.5mm. Fidelity and TIAA CREF are	Meeting held on 6/29 and sent proposal	On 7/6 Jim asked for the ADV and had questions	
11-Jun	N	Y	N	called, spoke briefly. Asked for a call on 6/12	Already uses an advisor			
13-Jun	Y	Y	N	emailed and called	called, then texted, replied saying she wasn't			
1-Jul	N	N	N	emailed and called	Called and texted on 7/5	called on 8/1	called on 8/24	voicemail and email on 11/2
2-Jul	N	N	N	emailed and called	called and texted on 7/5	called on 8/1	called on 8/24	number no longer works
2-Jul	N	N	N	emailed and called	call and voicemail on 8/15	voicemail and email on 11/2		

2-Jul		Y	Y	N	emailed and called	Called me back on 7/4, wants me to be in touch	called on 8/1		voicemail and email on 11/2
5-Jul		Y	N	N	emailed and called, appears to be a FA at Aon				
5-Jul		Y	Y	Y	Called and he is interested in a meeting. Sent email follow up.	Held meeting on 7/21 and following up with	Sent proposal on 7/23		
6-Jul		Y	Y	Y	emailed and called	emailed back to say that she will not leave liquidity	phone no longer works, sent email on 11/2		Many said she's not interested at this time via text
7-Jul		Y	Y	N	emailed and called	Over \$5mm, called on 8/1, wants to speak mid-	called on 10/6/texted		spoke with, wants a call on 11/7
7-Jul		Y	Y	N	spoke with briefly, gave an intro and followed up with an email.	called again on 8/1			
7-Jul		Y	Y	Y	spoke with on 7/7, same name as current client. Selling	Paul will be selling the properties my end of	Meeting scheduled for 9/7		Met with on 9/7, sent proposal on 9/9. His Meeting on 2/23/23
8-Jul		N	Y	N	called, spoke with briefly on 7/8. Interested in a planning session.	All liquidity is in real estate, has 3 properties, wants			
8-Jul		Y	Y	N	emailed and called	he is at Lockman Trust, not interested			
8-Jul		Y	N	N	emailed and called, replied via email saying he wasn't interested				
9-Jul		Y	N	N	emailed and called, he viewed my LinkedIn	called on 8/5	left voicemail on 8/17		voicemail and email on 11/2
2-Aug		Y	Y	N	Brief convo, he was on his way to cancer treatment	called again on 8/3 as he asked	called again on 8/17		He is happy with current advisor of 30 years
2-Aug		Y	Y	N	emailed and called	texted on 8/8	called and voicemail on 8/17		Has ROTH's at Fidelity, not a great fit has all money
3-Aug		N	N	N	emailed and called	texted on 8/8 but it is a home phone	called and voicemail on 8/17		called on 10/6
3-Aug		N	Y	N	emailed and called	called and texted on 8/8	called and voicemail on 8/17		informed me she found an advisor on 10/6
3-Aug		Y	Y	N	emailed and called	called and texted on 8/8	called and voicemail on 8/17		emailed me back on 8/4. He is getting a trust
4-Aug		N	Y	N	51 winter st rochester NH	Mailed letter on 8/17	Spoke w briefly on 9/20		Asked for client reference, gave Cynthia F
4-Aug		N	Y	N		called again on 8/17 after my email/call saying	called on 9/28		called me back, she has a lot of money and did not
4-Aug		N	N	N	emailed and called	called and texted on 8/8	called and voicemail on 8/17		voicemail and email on 11/2
5-Aug		N	N	N	emailed and called	called and texted on 8/8	called and voicemail on 8/17		voicemail and email on 11/2
5-Aug		N	Y	N	emailed and called	Spoke with on 8/8, 63, wants assets in a trust			
6-Aug		Y	N	N	emailed and called	called and texted on 8/8	called and voicemail 8/17		voicemail and email on 11/2
6-Aug		Y	N	N	emailed and called	called and texted on 8/8	called and voicemail on 8/17		voicemail and email on 11/2
6-Aug		Y	Y	N	emailed and called	called back on 8/17, seems a little sad			
1-Sep		N	N	N	emailed and called, voicemail full	texted and called on 9/9	called on 10/6		
1-Sep		Y	N	N	emailed and called	called on 9/6	called on 10/6 and left voicemail/texted		
1-Sep		N	N	N	emailed and called	called on 9/6	called and texted on 9/9		called on 10/6
2-Sep		Y	N	N	emailed and called	added me on LinkedIn on 9/6, called on 9/6 as well	called on 10/6		
3-Sep		N	Y	N	spoke with briefly, lives in NH. Enjoys going up to Vermont in his	He was busy when I called him on 10/6, said he			
3-Sep		Y	N	N	emailed and called	called on 9/6 Google Voice	called on 10/6		
4-Sep		Y	N	N	emailed and called. Landline	called again on 9/16			
6-Sep		N	N	N	emailed and called	called again on 9/9, texted	called on 10/6		
7-Sep		N	N	N	emailed and called	called again on 9/9, texted	called on 10/6		
8-Sep		Y	Y	Y	had a good conversation on 9/8, interested in a meeting	rolled up on 9/20 with a call	called on 10/6, interested in meeting. Has a good		Met with Bob on 11/7 and he seems interested
8-Sep		N	Y	Y	emailed and called, texted me back. UPS 62, wife is 64. 2 kids at	voicemail to check in if he was ok from Hurricane	voicemail on 11/1, wants to meet on 11/9		Meeting went well, 50/50. Had a great follow up
8-Sep		N	N	N	called and emailed, works for insurance, may be an advisor?	called again on 9/9, texted			Wants to touch base on 4/20
9-Sep		N	Y	Y	emailed and called	Zoom scheduled for 9/25	Meeting scheduled for 9/21		proposal sent on 10/6
9-Sep		Y	Y	N	has 1.8mm, he is retired and on the elderly side. He mentioned	called again on 2/13, 429 and 1bonds			
1-Oct		N	N	N	emailed and called, over \$5mm	called/texted again on 10/6	called on 10/11, went to vmail		no voicemail on 12/9
2-Oct		N	N	N	emailed and called	called/texted again on 10/6	called on 10/11, went to vmail		voicemail on 11/1
2-Oct		Y	N	N	emailed and called	called/texted again on 10/6	called on 10/11, went to vmail		voicemail on 11/1
3-Oct		Y	Y	Y	called me on 10/3 to book tentative meeting for 11/2. LOBT	Meeting scheduled for 11/3	Had a great call with her and her partner on 11/16		agreed to onboard on 12/28/23
3-Oct		N	Y	Y	emailed, called and messaged on LinkedIn. Works in insurance, if	texted on 10/11	called on 11/1		Meeting scheduled for 1/9 on 12/9
3-Oct		N	Y	N	emailed and called	called again on 10/6. Completely satisfied			winnixmontes@hotmail.com
5-Oct		N	Y	N	spoke with briefly and emailed. Said I could call back at 3pm on	spoke with again on 10/6	Touch base in 2023, said on 12/9		spoke with on 2/13, touch base in fall of 2023
8-Oct		Y	Y	Y	Spoke with for about 30 minutes on 10/8. Wanted to speak with	scheduled meeting	Had a great zoom with her and her 3 sons. We are		called on 12/9 and sent email requesting an update Reynolds family went with another provider
8-Oct		N	N	N	emailed and called	texted on 10/11	called on 11/1		voicemail on 12/9
10-Oct		N	Y	Y	emailed and called	called again on 10/11. Got a text back saying he	Met on 10/21. Had a good meeting. Heavy in real		texted on 10/31, called and emailed on 11/7
10-Oct		N	N	N	emailed and called. Owns his own electrician business	texted on 10/11	called on 11/1		called again on 11/18
9-Oct		Y	Y	N	emailed and called	on 10/19 she said she found someone			
9-Oct		Y	Y	N	spoke with briefly, 84, unclear if she was on her own or working	called again on 10/19	called on 11/18		
11-Oct		Y	Y	Y	emailed and called, he called me back on 10/11 and left a	Meeting scheduled for 10/21 in Narragansett. Good	texted on 10/31		Went with another firm
1-Nov		N	N	N	emailed and called	texted on 11/3	called again on 11/18		voicemail on 12/9
1-Nov		N	N	N	emailed and called	texted on 11/3	called again on 11/18		reads the blog, left another voicemail on 12/9
2-Nov		N	Y	N	emailed and called	texted on 11/3, texted back saying she wasn't interested			
2-Nov		N	N	N	emailed and called	texted on 11/4	called again on 11/18		voicemail on 12/9
2-Nov		N	N	N	emailed and called	texted on 11/4	voicemail on 12/9		
2-Nov		N	Y	N	emailed and called	spoke with on 11/9, gov't employee, he doesn't			
3-Nov		Y	N	N	emailed and called landline	called again on 11/18	voicemail is full on 12/9		
4-Nov		Y	N	N	emailed and called	texted on 11/18	voicemail on 12/9		
4-Nov		Y	Y	N	emailed and called	emailed me back on 11/5, saying she may prefer			
6-Nov		N	Y	Y	emailed and called, spoke with husband DJ. He is interested in	Meeting scheduled for 11/10 in NH			
7-Nov		N	Y	N	emailed and called	spoke with on 11/18, said he never filed out the form			
7-Nov		N	Y	N	called. He is an economist. Was a little rude	not interested in working with someone.			
7-Nov		N	Y	N	emailed and called	called again on 11/18			
11/23/2022		Y	Y	N	emailed and called	called and texted on 12/1, said he wasn't interested			
1-Dec		Y	Y	N	emailed and called	texted on 12/5, wrote me back saying he is waiting	texted on 2/13		
1-Dec		N	N	N	emailed and called	texted on 12/5	voicemail on 12/9		called on 1/14, didn't leave vmail
1-Dec		Y	N	N	emailed and called	texted on 12/5	voicemail on 12/9		called on 1/14, didn't leave vmail
2-Dec		N	N	N	emailed	called on 12/5	voicemail on 12/9		texted on 1/14
2-Dec		Y	N	N	emailed	called on 12/5	voicemail on 12/9		number was that of a teenager
3-Dec		N	N	N	emailed and called	texted on 12/5	voicemail on 12/9		called on 1/14, didn't leave vmail
4-Dec		N	N	N	emailed	called on 12/5	voicemail on 12/9		texted on 1/14
4-Dec		Y	Y	Y	emailed and called	texted on 12/5	voicemail on 12/9		wants an intro call with her husband on 1/19 at 10am
4-Dec		N	Y	N	emailed	called on 12/5	email on 12/9, insisted she was looking for someone		infr
5-Dec		Y	N	N	emailed and called	texted on 12/6	voicemail on 12/9		
5-Dec		N	N	N	emailed and called	texted on 12/6	voicemail on 12/9		
5-Dec		N	Y	Y	emailed and called	Had a great conversation on 12/6. Wants to speak	meeting scheduled for 1/11		spoke with briefly, wants me to follow up with him by 1/31
10-Dec		Y	N	N	emailed and called	called on 1/2	texted on 2/13		
10-Dec		N	Y	N	emailed and called, had a good conversation. Wants to talk to her	called on 1/2, was washing her dog	called on 1/16		e with on 2/13, wants to have a tentative call in a month
10-Dec		Y	N	N	emailed and called	called again on 1/2 and sent a text			
10-Dec		Y	Y	N	emailed and called. Spoke with briefly and wants a follow up call	Going to Europe until March, wants to connect			
14-Dec		N	N	N	emailed and called		texted on 1/13		
1-Jan		N	Y	N	emailed and called	called and texted on 1/2	called on 1/14, talked to her friend/partner		
1-Jan		Y	N	N	emailed and called	called and texted on 1/2	called on 1/14, landline?		
1-Jan		Y	Y	N	emailed and he wrote me back that he is unhappy with his	called 1/14, traveling to NJ. Wifes parents are having	health issues. Touch base in a month or two		
1-Jan		Y	Y	N	emailed and called				
2-Jan		N	Y	N	said she was just curious, spoke with current advisor				
2-Jan		Y	Y	N	emailed and texted, vmail full. Check to make sure it was	spoke w briefly, luke warm, asked me to leave vmail	with more info		
6-Jan		Y	N	N	emailed and called	texted on 1/24			
8-Jan		N	N	N	emailed and called	called on 1/14, texted	called on 1/24		
9-Jan		Y	N	N	emailed and called	called on 1/14, was a landline	called on 1/24		
10-Jan		N	Y	N	Called, had a good conversation. He is at Vanguard but is tired of	Said he is now all set and wants to continue to do it on his own			
10-Jan		Y	Y	N	\$1.6mm in retirement assets, \$600k in brokerage. Assets to move	vmail on 1/25			
13-Jan		Y	Y	N	emailed and called	said he is all set w current advisor			
13-Jan		Y	N	N	emailed and called	texted on 1/24			
15-Jan		N	N	N	emailed and called	texted on 1/24			
15-Jan		N	N	N	emailed and called	texted on 1/124			
15-Jan		N	N	N	emailed on 1/15	called on 1/16	texted on 1/24		
19-Jan		Y	Y	N	emailed and called	spoke with on 1/24, his current advisor is moving to	Wants me to reach out on 4/15		
21-Jan		Y	Y	N	emailed and called	called on 2/13 and wants to speak on 2/14	Called on 2/21 for scheduled call		
22-Jan		Y	N	N	emailed and called	texted on 2/13	Already has an advisor she is satisfied with		
23-Jan		Y	N	N	emailed and called	texted on 1/23			

24-Jan		Y	Y	N	emailed called, called me back on 1/24. 68 years old, likes to	called and texted on 2/13, scheduled call for 2/14
24-Jan		N	Y	N	emailed and called. Not sure if they have the stated assets of	
25-Jan		Y	N	N	emailed and called	texted on 2/13
27-Jan		Y	N	N	emailed and called	called on 2/13 (landline)
1-Feb		Y	Y	N	Son is managing money	
3-Feb		N	Y	N	He is satisfied with current advisor	
4-Feb		N	Y	N	emailed and called, using an email screener	Cell 508-360-7888
5-Feb		Y	N	N	emailed and called	reach out on 2/20
5-Feb		N	N	N	emailed and called	called again on 2/10
5-Feb		N	N	N	emailed and called, over \$5mm	texted on 2/13
6-Feb		Y	Y	N	emailed and called	texted on 2/13
6-Feb		Y	N	N	emailed and called	texted on 2/13
9-Feb		N	Y	N	spoke to briefly, interested in tax planning. Self managed	Called me back after text on 2/14 but I missed call
7-Feb		N	Y	Y	We had a good meeting, a bit prickly	
12-Feb		Y	N	N	emailed and called	texted on 2/13
12-Feb		Y	N	N	emailed and called	texted on 2/13
15-Feb		Y	Y	N	emailed and called	emailed on 2/17, said he wasn't interested for the time being
16-Feb		N	N	N	emailed and called	texted on 3/2
16-Feb		N	Y	N	emailed and called, said he wasn't interested	
20-Feb		N	N	N	emailed and called	texted on 3/2















