Retire		ontact I	Meeting	Note 1	Note 2	Note 3	Note 4	Note 5
Y		N Y	Y	Called and emailed on 11/2 Called and emailed on 11/3	called again on 11/4 spoke with on 11/5, set up meeting for 11/15	texted on 11/15 called on 12/10 to follow up post meeting	called on 2/15 Sticking with current advisor	called on 3/8 and 5/3
N		Y	Y	Called and emailed on 11/3	Called on 11/4 again, home phone?	Called at 4:30pm. Got him, \$300k cash from house	called and emailed again the week of 2/2/21	emailed on 6/6/22 and called
N		Y	Y	called and emailed on 11/5 called and emailed on 11/7	Wants follow up call on 11/10, had a very google voice, but sent text	Called Steve on 1/5/2021 to follow up.	called on 2/15 to follow up called on 3/8/22	Steve called on 3/8 to say he was still inte voicemail on 5/3
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
N		Y	N	called on 11/10, spoke with briefly, said I would send an email called and emailed on 11/11	1 or 2 years from retirement. 9mm opportunity. called and texted on 11/15	called again on 2/15 called again on 2/15	voicemail on 5/3 called on 5/9	called on 8/8 and 9/28 called again on 9/28
N		Ŷ	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.	
N		N	N	emailed and called had a brief call, was busy, followed up with an email, seemed	called on 12/14 called again on 2/1/22	called on 2/15 called again on 2/15	texted on 5/9 texted on 5/9, not interesed in reply	number no longer works
Ŷ,		N	N	Over \$5mm. Called and emailed	called on 12/14	texted on 5/9	voicemail full on 9/28	
N		Y	N	emailed and called	emailed back, wants individual bond management called on 12/14	Not interested called on 2/15	texted on 5/9	called on 9/28 and sent email
N	1	N Y	N	emailed and called emailed and called	called on 12/14 called on 12/14	called on 2/15 called on 2/15	spoke with briefly on 5/9. At eastern bank wealth	called on 9/28 and sent email
Y I		N	N	emailed and called	called on 12/14	called on 2/15	Not interested	
N	_	N	N	emailed and called	called on 2/3, playing gold in FL. Still interested, called on 12/14	called on 2/15, said he is sending me portfolio called on 2/15	texted on 5/9	He wants to be added to a mailing list.
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
Č,		Y	N	emailed and called called and sent email. Sonke with briefly, seemed uninterested	Spoke with spouse on 12/14. Listened to my whole			
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
N	_	Y	N	Emailed and called	spoke with on 1/28, said he never entered his nam spoke with on 1/28, want to connect in early	sent email follow up on 2/3/22 and a call	victual meeting on 2/10	said to touch base in 2024
Y		Y	N	Emailed and called	called on 2/3	called on 2/15	passed away	Sald to touch base in 2024
Y I		Y	N	Emailed and called	Found a provider, maybe touch base 2023			-
N	_	Y	N	Emailed and called	Has a few providers but several orphan 401k's. Also	 Sent follow up email to book meeting on 2/4 texted on 5/9 	number not in service	
Y		Y	N	Emailed and called	Went w/ Vanguard			
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	
		Y	N	spoke with for about 30 minutes. Has some real estate questions Spoke with on 1/4, scheduled follow up call for 1/5 but he flaked.	rescheduled call for 2/7 at 11am	Sent follow up email to book meeting on 2/4 flaked on 2nd call		
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	
N		N	N	emailed and called. looking for flat fee. Light work until he passes. Looking for a	called again on 2/3 called again on 2/3. Sent follow up email	called on 2/15 still interested in working. Thinking about the setup	texted on 5/9	email and vmail on 11/2
Y N	J	Ŷ	N	emailed and called	called again on 2/3. Sent follow up email called again on 2/3	Spoke with on 2/18, wanted husband looped in.	left voicemail on 8/8	
N	_	Y	Y	emailed and called	called again on 2/3	Virtual Meeting scheduled for 2/25	touch base late in the summer. Not interested in	
Y	_	N	N	emailed and called emailed and called	called again on 2/3 spoke with on 2/18, semi-retired from nursing.	texted on 8/8 met with on 2/21. Productive meeting. Still has	email and vmail on 11/2 texted on 4/4/22	called on 5/3, she is having health issu
Y		Ŷ	N	emailed and called	Not interested in working with someone.	Sur las		and an of of one of normal realth issu
N		Y	Y N	Spoke with Doug, CFO of Edelman. Doesn't want his money at his emailed and called	called to check in on 2/18	sent text on 2/22	followed up with an email/text on 5/27	Doug went with JPM but he said to stay
Ŷ		N Y	N	emailed and called Spoke briefly, wanted an email to go over my background. Said	called again on 2/18, left vmail called and emailed on 2/18	called on 8/24 called again on 3/9, spoke with breifly, maybe reach		
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	sticking with Merrill		_
Č.		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	
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
N		Y	Y	Had a conversation on 3/1, seems interested. Wanted follow up	Had a conversation on 3/7. He was very interested			
N		Y N	N N	called on 3/1. Owns her own law firm and home. Does not have a emailed and called	ert a re-intro email on 2/16/23 left voicemail on 5/3	called ono 6/15	texted on 8/8	
Y		Y	N	spoke with on 3/3. Strong preference for utilities and income.	texted on 8/8, landline			
- <u>- </u> ;		N	N	emailed and called emailed and called	called on 3/9	He wants me to call his wife, Erin 508-250-5664. texted on 8/8, replied to the text saying she was	spoke with Paul on 5/27 and he is still texted on 2/16/23	texted on 8/15, email and vmail on 11/2
N		Ŷ	N	follow up call scheduled for 3/10	He was only looking for access to private funds	texted on 0/0, replied to the text suping site mus	CXC0 01 1, 10, 15	
N		Y	N	spoke with on 3/4, didn't seem interested. emailed and called	called on 3/9	texted on 8/8	called on 10/11	
T N	1	N N	N	emailed and called	called on 3/9	texted on 8/8	called on 1/16	
Y		N	Ν	emailed and called emailed and called	called on 3/9	texted on 8/8, also landline		
N		N Y	Y	emailed and called	called again on 3/21 4/7, set up a call with Bruce for 4/8	called again on 3/28 \$3mm invested. Spoke with on 6/15. Touch base	touched base on 8/8, call in late September.	left voicemail on 1/2/23
<u>ч</u>		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	texted on 6/15	voicemail on 8/8	
N		Y N	Y	emailed and called, scheduled meeting for 4/13 Emailed and called	Maureen Berry: moberryrn@gmail.com 617-620- called and texted on 4/14	called on 6/15	voicemail on 8/8	
N		Y	N	Not interested, happy w/ current advisor				
Y		N	N	emailed and called	called and texted on 4/14	called on 8/8	Not interacted	
N		N	N	emailed and called emailed and called	Called and texted on 4/14 Called again on 5/3, left voicemail	called on 6/4 called on 6/15	voicemail on 8/8	
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 bae by	call Tim Sanboorn 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 e
N		Y	N	emailed and called emailed and called	called and texted on 4/14 called and texted on 4/14	voicemail on 5/3 voicemail on 5/3	Not interested called on 6/4	called, email, voicemail on 11/2
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
N		Y	N	emailed and called (google voice)	called again on 5/10	texted on 8/8	called, email, voicemail on 11/2	seemed luke warm on change but very i
					texted me back on 5/10, said he would be in touch			
Y		Ŷ	N	emailed and called, over \$5mm Replied to my email saying he wanted a call on 5/4	by 5/18. If you don't hear from him, text him had meeting on 5/9. Seemed interested, sent	texted on 5/26 with calendly link Have a tentative call set up for 6/3 to review	called on 6/15 on 7/21 he suggested I circle back at the end of th	
N		Ŷ	N	scheduled a call for 4pm Tuesday 5/3, call was postponed. Ping	Called Steve on 6/15	left voicemail on 8/8	and a subsection of the back at the end of the	
N		Y	Y	emailed and called emailed and called	texted and called on 5/10 texted and called on 5/10	Maria is interested on when she can retire. Follow voicemail on 8/8		
		N Y	N	emailed and called	Called me on 5/6, already has a meeting with an	voicemail on 8/8 left voicemail on 6/2, she is sticking with her current		
Y				snoke with briefly, wants me to call him back on 5/3 at 4/20 for	texted back on 5/10 that he was staying put after		-	
Y N		Y	N	spoke that breatly, thenes the to call him back on 5/5 at 4.20 for				
Y N		Y Y Y		emailed and then called on 5/4. Seemed eager to have a emailed and called	Has about 1.5mm, most at Vanguard. 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	
Y N N Y		Y Y Y Y	N N	emailed and called	texted and called on 5/10 texted and called on 5/10	Called on 6/2/22, he texted me back to say he Called on 6/2/22	spoke with on 6/30, touch base in late July/early voicemail left on 8/8	Said he wasn't interested
Y N		Y Y Y N	N N			Called on 6/2/22, he texted me back to say he Called on 6/2/22, he texted me back to say he Called an 6/2/22 called again on 6/2/22	we had a planning meeting on 3/20/22, sent a spoke with on 6/30, touch base in late July/early volcemail left on 8/8 called on 6/30	Said he wasn't interested called on 11/2, voicemail and email
Y N N Y		Y Y Y N N Y	N N N	emailed and called	texted and called on 5/10 texted and called on 5/10 texted and called on 5/10 texted on 6/4	Called on 6/2/22, he texted me back to say he Called on 6/2/22 called again on 6/2/22 texted on 8/8	spoke with on 6/30, touch base in late July/early voicemail left on 8/8	Said he wasn't interested
Y N N Y N		Y Y Y N N Y N	N N N	emailed and called emailed and called emailed and called emailed and called	texted and called on 5/10 texted and called on 5/10 texted and called on 5/10 texted on 6/4	Called on 6/2/22, he texted me back to say he Called on 6/2/22 called again on 6/2/22 texted on 8/8	spoke with on 6/30, touch base in late July/early voicemail left on 8/8	Said he wasn't interested
Y N N Y N		Y Y Y N N Y N	N N N	emailed and called emailed and called emailed and called emailed and called emailed and called, larry emailed back on 6/2 to say he would be emailed and called, and texted. Voicemail full. Profile says he has	texted and called on 5/10 texted and called on 5/10 texted and called on 5/10 texted on 5/4 Has several health issues. Has about \$1mm in cash texted on 5/8 called on 6/8	Called on 6/2/22, he texted me back to say he Called on 6/2/22 called again on 6/2/22 texted on 8/8	spoke with on 6/30, touch base in late July/early voicemail left on 8/8	Said he wasn't interested
Y N N Y N		Y Y Y N N N Y Y Y	N N N	emailed and cailed emailed and cailed emailed and cailed emailed and cailed emailed and cailed, Larry emailed back on 6/2 to say he would be	texted and called on 5/10 texted and called on 5/10 texted and called on 5/10 texted on 5/4 Has several health issues. Has about \$1mm in cash texted on 5/8 called on 6/8	Called on 6/2/22, he texted me back to say he Called on 6/2/22 called again on 6/2/22 texted on 8/8	spoke with on 6/30, touch base in late July/early voicemail left on 8/8	Said he wasn't interested
Y N N Y N		Y Y Y N N Y Y Y Y Y	N N N	emailed and called emailed and called emailed and called emailed and called emailed and called. Larry emailed back on 6/2 to say he would be emailed, called, and back of Votemail full. Profile say he lins. Spoke with saistich, be provided backenses number: Series Spoke with saistich, be provided backenses number. Series familed and called. He texted me back, indicated once things Emailed and called.	texted and called on 5/10 leaded and called on 5/10 texted and called on 5/10 texted and called on 5/10 texted on 6/4 Has several health issues. Has about \$1mm in cash texted on 6/5 called on 6/6	Called on 6/2/22, bet exted me back to say he Called on 6/2/22 called again on 6/2/22 texted on 6/8/ Called Larry on 8/8 number itso longer valid called on 6/30	spoke with on 6/30, touch base in late July/early volcemail left on 8/8 called on 6/30 number not in service Needs a portugese translator 9/28	Said he wasn't interested
Y N N Y N		Y Y Y N Y Y Y Y Y Y	N N N	emailed and called emailed and called emailed and called emailed and called emailed and called, Larry emailed back on 6/2 to say he would be mailed and called, Larry emailed back on 6/2 to say he would be mailed and called. He restered mer to back indicated once things Emailed and called. He toted me back, indicated once things Emailed and called. He toted me back, indicated once things Emailed and called.	texted and called on 5/10 beater and called on 5/10 texted and called on 5/10 beated on 1/24 Has several health issues. Has about \$1mm in cashs backed on 5/8 called on 8/8 called on 8/8 called appin on 8/1, left-volcemal texted Bruce on 6/7	Called on 6/2722, he tested me back to say he called on 6/2722 called again on 6/2/22 called again on 6/2/22 Called Larry on 8/8 Called Larry on 8/8 called on 8/24 called on 8/24 called on 8/24	socke with on 5/30, touch base in late July/early workmail of the sol 1/2 called on 6/30 Summer not in simular Meetis a partugene translater 8/28 workemail and email on 11/2 voicemail and email on 11/2	Said he wasn't interested
Y N N Y N		Y Y N N Y Y Y Y Y Y Y	N N N N N N N N N	emailed and called emailed and called emailed and called emailed and called emailed and called, Larry emailed back on 6/2 to say he would be emailed and called, Larry emailed back on 6/2 to say he would be instance and called. Larry emailed back on 6/2 to say he would be and the solution of the solution of the memory of the emailed and called. He tacted me back, indicated once things Emailed and called. He tacted me back, also focused on tax emailed and called.	texted and called on 5/10 beauting and called on 5/10 texted and called on 5/10 beauting the second on 5/10 beauting the second second second second second second beauting the second second second second second second called and no 8/1, left-volcemail texted Bruce on 6/7 Wants me to touch base in the middle of July. Meeting scheduler for 6/28, reschedued to 6/29	Called on 6/27.22, he tested me back to say he Called on 6/27.22 Called again on 6/2/22 Called Larry on 8/8 Called Larry on 8/8 Called Larry on 8/8 Called Larry on 8/8 Called and voicemail on 8/1 Called on 8/2.4 Called on 8/3.1et voicemail Meeting held on 6/23 and sent proposal on 6/30.	spoke with on 6/30, touch base in late July/early voicemail left on 8/30 called on 6/30 pumber not in service Needs a partugese translator 9/28 voicemail and email on 11/2	Said he wasn't interested
Y N N Y N		Y Y N N Y Y Y Y Y Y Y Y Y	N N N N N N N N N	emailed and called emailed and called emailed and called emailed and called emailed and called emailed and called, Larry emailed back on 6/2 to say he would be emailed, called, Larry emailed back on 6/2 to say he would be emailed, called, Larry emailed back on 6/2 to say he would be emailed and called. He texted me back, indicated once things. Emailed and called Spoke with him, chat'y guy, income focused, also focused on tax emailed and called.	texter and called on 5/10 beford and called on 5/10 beford on 6/24 Has several health issues. Has about \$1mm in cash beford on 5/2 called on 8/8 called on 8/8 called on 8/8 called on 8/8 texter of the total beford of the total beford texter of the total beford of the total beford Wants me to total bots in the middle of July. Meeting checkled for 6/28, rescheduled to 6/29 texter of n 6/24	Called on 6/2/22, he texted me back to say he Called on 6/2/22. Called again on 6/2/22 Called again on 6/2/22 Called arry on 8/8 Called arry on 8/8 Called arry on 8/9 Called and vicemail on 8/1 Called and vicemail on 8/1 Called and vicemail on 8/1 Called on 8/3, left voicemail Meeting held on 6/29 and sent proposal on 6/30, vicemail and mail on 11/2	spoke with on 6/30, touch base in late July/early workmail life on 8/4 called on 6/30 member not in serve Needes a portugese translator 9/28 voicemail and email on 11/2 voicemail and email on 11/2 spoke with on 10/7, call later in 2022. Has Called on 8/8 to follow up on any questions	Said he wasn't interested
Y N N Y N		Y Y N N Y Y Y Y Y N Y Y Y Y	N N N N N N N N N	emailed and called emailed and called emailed and called emailed and called emailed and called, Larry emailed back on 6/2 to say he would be emailed and called, Larry emailed back on 6/2 to say he would be instance and called. Larry emailed back on 6/2 to say he would be and the solution of the solution of the memory of the emailed and called. He tacted me back, indicated once things Emailed and called. He tacted me back, also focused on tax emailed and called.	texted and called on 5/10 beauting and called on 5/10 texted and called on 5/10 beauting the second on 5/10 beauting the second second second second second second beauting the second second second second second second called and no 8/1, left-volcemail texted Bruce on 6/7 Wants me to touch base in the middle of July. Meeting scheduler for 6/28, reschedued to 6/29	Called on 6/27.22, he tested me back to say he Called on 6/27.22 Called again on 6/2/22 Called Larry on 8/8 Called Larry on 8/8 Called Larry on 8/8 Called Larry on 8/8 Called and voicemail on 8/1 Called on 8/2.4 Called on 8/3.1et voicemail Meeting held on 6/23 and sent proposal on 6/30.	spoke with on 6/30, touch base in late July/early working like for 8/4 mamber not in service Needs a portugese translator 9/28 volcemail and email on 11/2 volcemail and email on 11/2 spoke with on 10/7, call later in 2022. Has	Said he wasn't interested
Y N N N N N N N Y Y Y Y Y Y N N N N N N		Y N N Y Y Y Y Y Y N Y Y Y Y Y	N N N N N N N N N N Y N Y N N N	emailed and called emailed and called emailed and called emailed and called emailed and called emailed and called. Larry emailed back on 6/2 to say he would be emailed and called. Larry emailed back on 6/2 to say he would emailed and called. Larry emailed back on 6/2 to say he would be poly of the same of the same of the same of the same emailed and called. He texted we back, indicated once things formalist and called. He texted we back, indicated once things formalist and called. He texted we back, indicated once things formalist and called. He texted we back, indicated once things emailed and called provide and called emailed and called emailed and called emailed and called. emailed and called emailed and called.	texted and called on 5/10 Heater and called on 5/10 texted and called on 5/10 texted and called on 5/10 texted and called on 5/10 Has several health issues. Has about \$1mm in cash heated on 5/2 called on 8/2 called on 8/2 texted for constants texted for constants texted for constants Heated Structure on 6/7 Wants me to toxich base in the middle of July. Meeting candude for 6/28, reschedued to 6/29 texted on 6/74 Jim has \$2mm - 2.5mm. Hidely and TAA CEEE and Aliready uses an advisor	Called on 6/272, he tested me back to say he Called on 6/272, called again on 6/2/22 Called again on 6/2/22 Called Larry on 8/8 Called Larry on 8/8 Called Larry on 8/8 Called Larry on 8/8 Called and Voicemail on 8/1 Called and Voicemail on 8/1 Called and Voicemail on 8/1 Called and Voicemail on 8/1 Called and Voicemail on 8/1 Meeting held on 6/29 and sent proposal Meeting held on 6/29 and sent proposal	spoke with on 5/30, rouch base in late July/early wolcomail left on 1/8 called on 6/30 Dumer role in window NetCli a portuges (rankistor 5/28 volcemail and email on 11/2 volcemail and email on 11/2 spoke with on 10/7, call later In 2022. Has Called on 8/8 to follow up on any questions On 7/6 Jim asked for the ADV and had questions	Sed he vasor? interested called on 11/2, voicemail and email Not a real prospect
Y N N Y N		Y Y N N Y Y Y Y Y N Y Y N Y Y N N N N	N N N N N N N N N N Y N Y N N N	emailed and called emailed and called emailed and called emailed and called emailed and called emailed and called, Larry emailed back on 6/2 to say he would be emailed, called, Larry emailed back on 6/2 to say he would be emailed, called, Larry emailed back on 6/2 to say he would be emailed and called. He texted me back, indicated once things. Emailed and called Spoke with him, chat'y guy, income focused, also focused on tax emailed and called.	texter and called on 5/10 beford and called on 5/10 beford on 6/24 Has several health issues. Has about \$1mm in cash beford on 5/2 called on 8/8 called on 8/8 called on 8/8 called on 8/8 texter of the total beford of the total beford texter of the total beford of the total beford Wants me to total bots in the middle of July. Meeting checkled for 6/28, rescheduled to 6/29 texter of n 6/24	Called on 6/2/22, he texted me back to say he Called on 6/2/22. Called again on 6/2/22 Called again on 6/2/22 Called arry on 8/8 Called arry on 8/8 Called arry on 8/9 Called and vicemail on 8/1 Called and vicemail on 8/1 Called and vicemail on 8/1 Called on 8/3, left voicemail Meeting held on 6/29 and sent proposal on 6/30, vicemail and mail on 11/2	spoke with on 6/30, touch base in late July/early workmail life on 8/4 called on 6/30 member not in serve Needes a portugese translator 9/28 voicemail and email on 11/2 voicemail and email on 11/2 spoke with on 10/7, call later in 2022. Has Called on 8/8 to follow up on any questions	Said he wasn't interested

Y	Y N	emailed and called	Called me back on 7/4, wants me to be in touch			
Y	N N	emailed and called, appears to be a FA at Aon	called the back on 774, wants the to be in total	called on 8/1	voicemail and email on 11/2	
N	Y Y	called and he is interested in a meeting. Sent email follow up,	Held meeting on 7/21 and following up with	Sent poropsal on 7/23		
Y V	Y N	emailed and called emailed and called	emailed back to say that she will not have liquidity Over \$5mm_called on 8/1_wants to speak mid-	phone no longer works, sent email on 11/2 called on 10/6/texted	Mary said she is not interested at this time via text spoke with, wants a call on 11/7	
Y	Y N	spoke with briefly, gave an intro and followed up with an email.	called again on 8/1			
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
N	Y N	called, spoke with briefly on 7/8. Interested in a planning session emailed and called	 An inquidity is in real esate, has 3 properties, wants He is at Rockland Trust, not interested 			
Y	N N	emailed and called, replied via email saying he wasn't interested				
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	
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	
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	voicemail and email on 11/2
N	Y N	emailed and called emailed and called	called and texted on 8/8 called and texted on 8/8	called and voicemail on 8/17 called and voicemail on 8/17	informed me she found an advisor on 10/6 emailed me back on 8/4. He is getting a trust	emailed on 1/2/23
N	Y 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	
Y	Y N	emailed and called	Sent a text back to me after my email/call saying	called on 8/17 and texted	called on 9/28, she has a lot of money and did not	
N N	N N		called and texted on 8/8 called and texted on 8/8	called and voicemail on 8/17 called and voicemail on 8/17	called on 9/28 called on 9/28	voicemail and email on 11/2 voicemail and email on 11/2
N	Y N	emailed and called	Spoke with on 8/8, 63, wants assets in a trust			
Y	N N	emailed and called emailed and called	called and texted on 8/8	called and voicemail 8/17	called on 8/24 called on 8/24	voicemail and email on 11/2
Y	N N	emailed and called	called and texted on 8/8 called and texted on 8/8	called and voicemail on 8/17 texted back on 8/17, seems a little odd	called on 8/24	voicemail and email on 11/2
N	N N	emailed and called, voicemail full	texted and called on 9/9	called on 10/6	-	
Y	N N	emailed and called	called on 9/6	called on 10/6 and left voicemail/texted		
N	N N V N	emailed and called emailed and called	called on 9/6 added me on Linkedin on 9/6, called on 9/6 as well	called and texted on 9/9 called on 10/6	called on 10/6	
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			
Y	N N	emailed and called	called on 9/6 Google Voice	called on 10/6		
Y	N N	emailed and called. Landline emailed and called	called again on 9/16 called again on 9/9, texted	called on 10/6		
N	N N	emailed and called	called again on 9/9, texted	called on 10/6		
N	Y Y	had a good conversation on 9/8, interested in a meeting	Followed 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	
N	Y Y	emailed and called, texted me back. UPS 62, wife is 64. 2 kids at called and emailed, works for insurance, may be an advisor?	voicemail to check in if he was ok from Hurricane called again on 9/9, texted	voicemail on 11/1, wants to meet on 11/9	Meeting went well, 50/50. Had a great follow up	Wants to touch base on 4/20
N	Y Y	emailed and called	Zoom scheduled for 9/15	Meeting scheduled for 9/21	proposal sent on 10/6	
Y	Y N	has 1.8mm, he is retired and on the elderly side. He mentioned	called again on 2/13, CD's and Ibonds			-
N	N N	emailed and called, over \$5mm emailed and called	called/texted again on 10/6	called on 10/11, went to vmail called on 10/11, went to vmail	no voicemail on 12/9	voicemail on 12/9
N Y	N N	emailed and called emailed and called	called/texted again on 10/6 called/texted again on 10/6	called on 10/11, went to vmail called on 10/11, went to vmail	voicemail on 11/1 voicemail on 11/1	voicemail on 12/9 voicemail on 12/9
Y	Y Y	called me on 10/3 to book tentative meeting for 11/2. LGBT	Meeting scheduled for 11/3	Had a great call with her and her partner on 11/16	 agreed to onboard on 12/28/22 	
N	Y Y	emailed, called and messaged on Linkedin. Works in insurance,	f texted on 10/11	called on 11/1	Meeting scheduled for 1/9 on 12/9	winniexmontes@hotmail.com
Y	Y N	emailed and called spoke with briefly and emailed. Said I could call back at 3pm on	called again on 10/6. Completely satisfied	Touch base in 2023, said on 12/9	spoke with on 2/13, touch base in fall of 2023	
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 prov
N	N N		texted on 10/11	callex on 11/1	voicemail on 12/9	
N N	Y Y N N	emailed and called emailed and called. Owns his own electrician business	called again on 10/11. Got a text back saying he texted on 10/11	Met on 10/21. Had a good meeting. Heavy in real called on 11/1	texted on 10/31, called and emailed on 11/7 called again on 11/18	called on 12/9, texted asking for an upda
Y	Y N	emailed and called	on 10/19 she said she found someone	caned OII 11/1	conco ugalii Uli 11/10	
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	187	
Y N	Y Y	emailed and called, he called me back on 10/11 and left a emailed and called	Meeting scheduled for 10/21 in Nantucket. Good texted on 11/3	texted on 10/31 called again on 11/18	Went with another firm voicemail on 12/9	
N	N N		texted on 11/3	called again on 11/18	reads the blog, left another voicemail on 12/9	
N	Y N	hallen hne hallen	texted on 11/3, texted back saving she wasn't intere			
		cindica and called		sted		
N N	N N		texted on 11/4 texted on 11/4	sted called again on 11/18 voicemail on 12/9	voicemail on 12/9	
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	N N Y N N N	emailed and called emailed and called emailed and called landline	texted on 11/4 spoke with on 11/5, gov't employee, he doesn't called again on 11/18	voicemail on 12/9 voicemail is full on 12/9	voicemail on 12/9	
	N N Y N	emailed and called emailed and called emailed and called landline	texted on 11/4 spoke with on 11/5, gov't employee, he doesn't	voicemail on 12/9	volcemail on 12/9	
	N N Y N N N	emailed and called emailed and called emailed and called landline	texted on 11/4 spoke with on 11/5, gov't employee, he doesn't called again on 11/18	voicemail on 12/9 voicemail is full on 12/9	voicemail on 12/9	
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	N N Y N N N	emailed and called emailed and called emailed and called landline emailed and called emailed and called	texted on 11/4 spoke with on 11/5, gov't employee, he doesn't called again on 11/18 texted on 11/18 emailed me back on 11/5, saying she may prefer	voicemail on 12/9 voicemail is full on 12/9	voicemail on 12/9	
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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	
N	Y	N	emailed and called. Not sure if they have the stated assets of		
Y	N	Ν	emailed and called	texted on 2/13	
Y	N	Ν	emailed and called	called on 2/13 (landline)	
Y	Y	N	Son is managing money		
N	Y	N	He is satisfied with current advisor		
N	Y	Ν	emailed and called, using an email screener	Cell 508-360-7888	
Y	N	N	emailed and called	reach out on 2/20	
N	N	N	emailed and called	called again on 2/10	
N	N	Ν	emailed and called, over \$5mm	texted on 2/13	
Y	Y	Ν	emailed and called	texted on 2/13	Called me back after text on 2/14 but I missed call
Y	N	N	emailed and called	texted on 2/13	
N	Y	Ν	spoke to briefly, interested in tax planning. Self managed		
N	Y	Y	We had a good meeting, a bit prickly		
Y	N	N	emailed and called	texted on 2/13	
Y	N	N	emailed and called	texted on 2/13	
Y	Y	N	emailed and called	emailed on 2/17, said he wasn't interested for the ti	me being
N	N	N	emailed and called	texted on 3/2	
N	Y	N	emailed and called, said he wasn't interested		
N	N	N	emailed and called	texted on 3/2	















