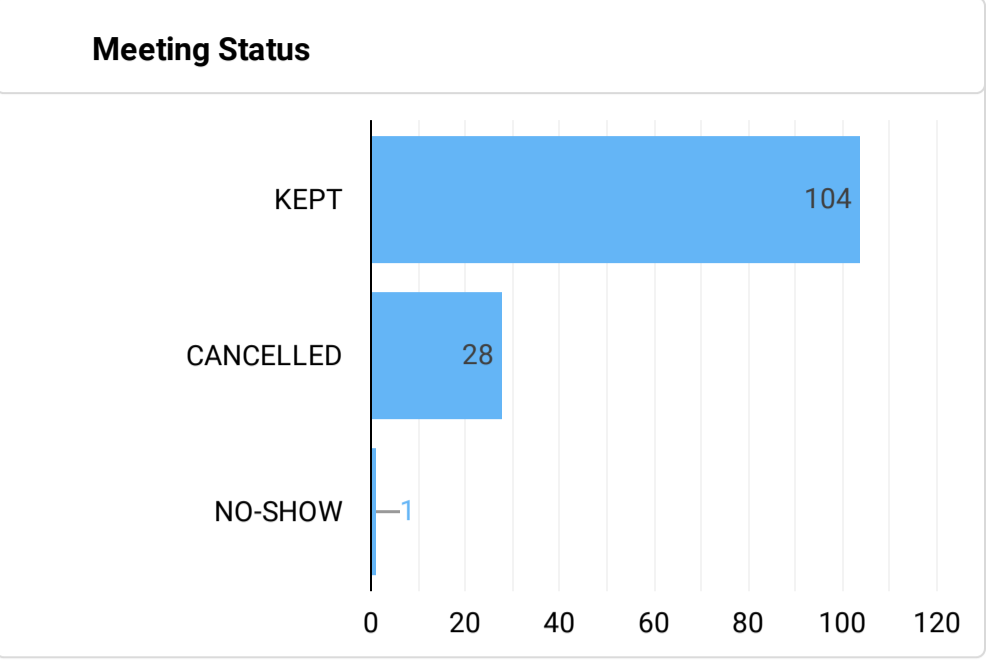
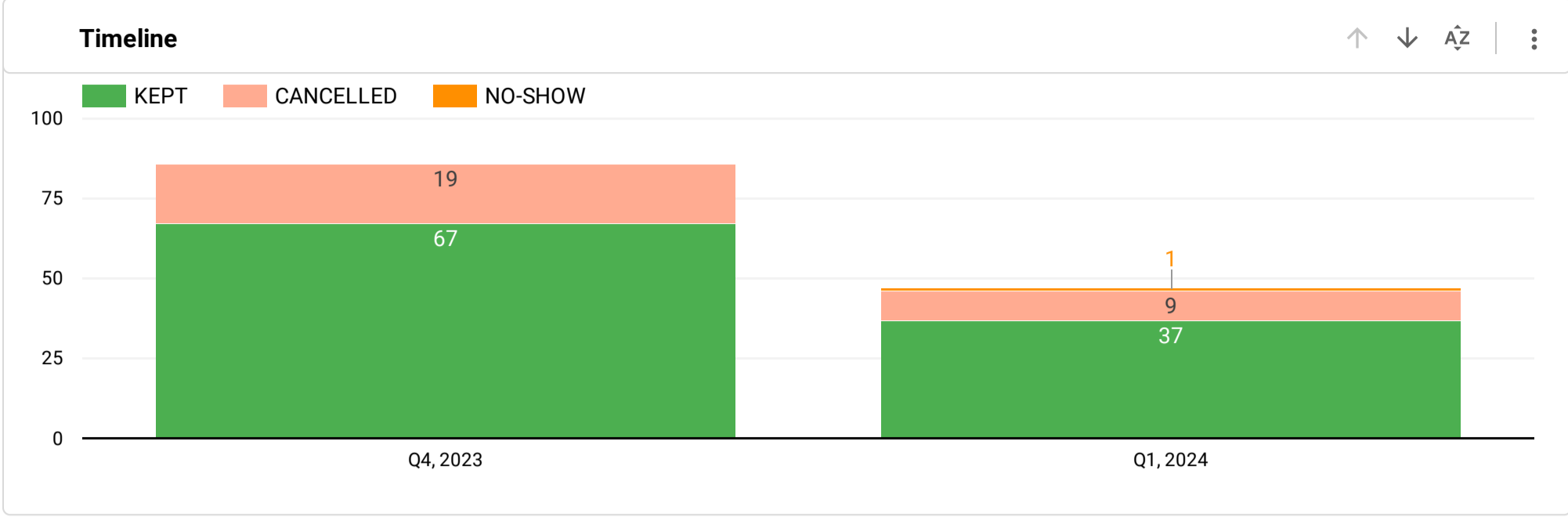
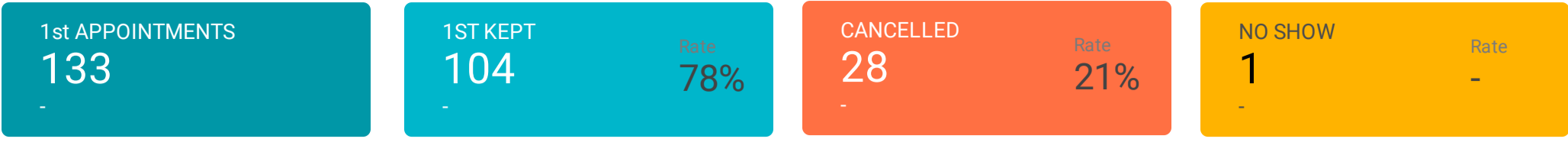


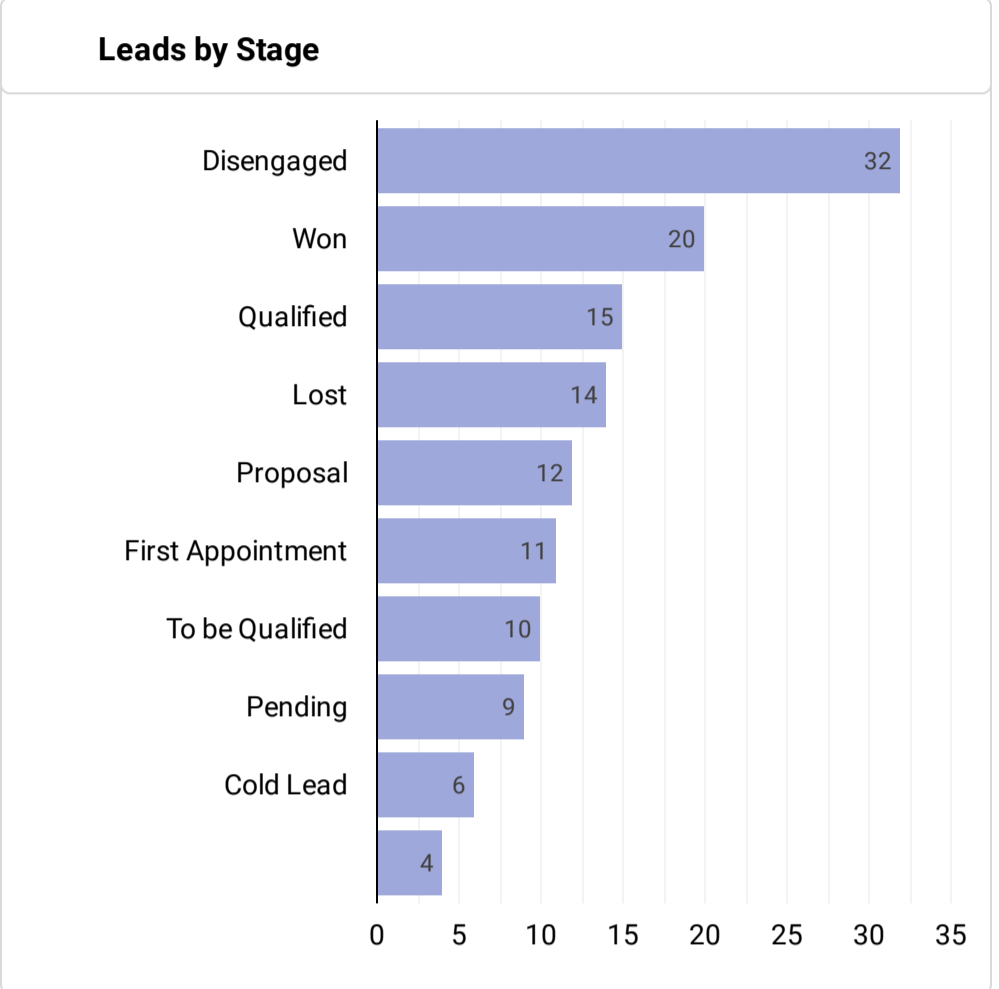
Lead Source Lead Stage Lead State Lead Owner Feb 1, 2023 - Feb 27, 2024

Advisor Meeting Status Meeting Category



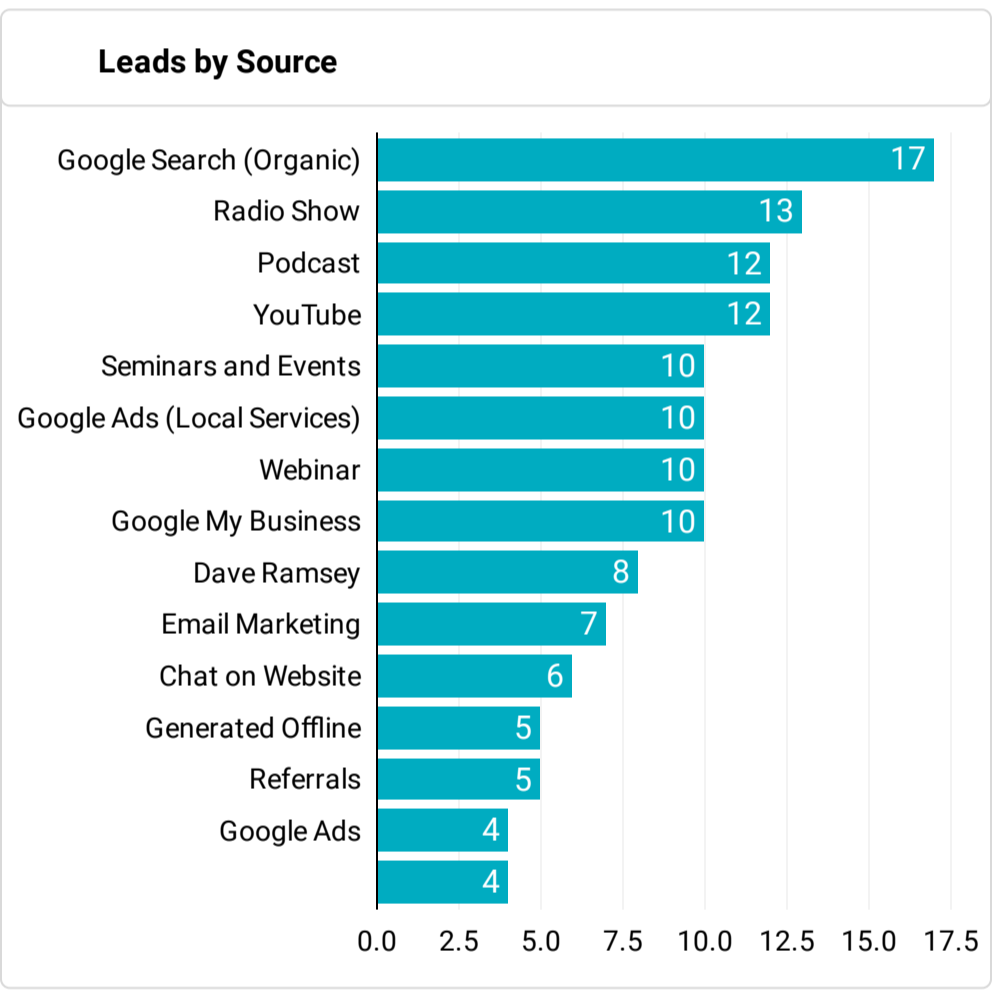
1st Appointment by Advisor

Advisor	1st Set	Δ	1st Kept	% Kept	Advisor	# Leads	Become Client	Become Client /Kept	Pending	Pending /Kept
1. Janet Smith	18	-	15	83%	1. Janet Smith	17	1	7%	11	79%
2. John Smith	1	-	1	100%	2. John Smith	1	0		1	100%
3. Mehnur Baig	9	-	6	67%	3. Mehnur Baig	9	1	17%	4	67%
4. Michael Jordan	55	-	42	76%	4. Michael Jordan	53	9	22%	19	46%
5. Sarah Johnson	50	-	40	80%	5. Sarah Johnson	48	8	21%	25	64%
Grand total	133	-	104	78%	Grand total	128	19	19%	60	59%



1st Appointment by Source

Lead Source	1st Set	Δ	1st Kept	% Kept	New Clients	Become Client / Kept	Pending	Pending /Kept
1. Google Search (Organic)	17	-	13	76%	0	0%	7	0.54
2. Radio Show	13	-	10	77%	0	0%	5	0.5
3. YouTube	12	-	10	83%	0	0%	4	0.4
4. Podcast	12	-	9	75%	0	0%	6	0.67
5. Seminars and Events	10	-	8	80%	0	0%	6	0.75
6. Google Ads (Local Services)	10	-	8	80%	0	0%	8	1
7. Email Marketing	7	-	7	100%	0	0%	6	0.86
8. Webinar	10	-	7	70%	0	0%	3	0.43
9. Dave Ramsey	8	-	7	88%	0	0%	2	0.29
1... Google My Business	10	-	6	60%	0	0%	2	0.33
1... Generated Offline	5	-	4	80%	0	0%	3	0.75
1... Chat on Website	6	-	4	67%	0	0%	1	0.25
1... Google Ads	4	-	4	100%	0	0%	2	0.5
Grand total	133	-	104	78%	0	0%	61	0.59



List of Appointments

Contact ID Link	Client Name	Advisor	Lead Stage	Meeting Date	Meeting Status	Cancelled Date	Cancellation Reason	Lead State	Meeting Category
83319	Emelita Vynoll	Sarah Johnson	Won	Jan 21, 2024	CONFIRMED			Closed	1st Visit - Not a Client
82945	Gideon Hospital	Michael Jordan	Disengaged	Nov 19, 2023	COMPLETED			Closed	1st Visit - Not a Client
82996	Dosi Antonoyev	Sarah Johnson	Qualified	Nov 23, 2023	CONFIRMED			Open	1st Visit - Not a Client
82997	Mei Blondell	Michael Jordan	To be Qualified	Dec 9, 2023	CONFIRMED			Open	1st Visit - Not a Client
82998	Josh Pontin	Janet Smith	First Appointment	Nov 30, 2023	COMPLETED			Open	1st Visit - Not a Client
83001	Veriee Bambrugh	Michael Jordan	Proposal	Nov 20, 2023	CANCELLED			Open	1st Visit - Not a Client
83004	Milissent MacMenamie	Sarah Johnson	First Appointment	Dec 30, 2023	COMPLETED			Open	1st Visit - Not a Client
83005	Slade Jeanel	Michael Jordan	First Appointment	Jan 19, 2024	CONFIRMED			Open	1st Visit - Not a Client
83007	Helga Larret	Michael Jordan	Disengaged	Nov 24, 2023	CONFIRMED			Closed	1st Visit - Not a Client
83009	Linnet Doggart	Janet Smith	Disengaged	Dec 2, 2023	CONFIRMED			Closed	1st Visit - Not a Client
83014	Kittie Goodbur	Sarah Johnson	Disengaged	Nov 30, 2023	CONFIRMED			Closed	1st Visit - Not a Client
83014	Kittie Goodbur	Michael Jordan	Disengaged	Dec 16, 2023	CANCELLED			Closed	1st Visit - Not a Client
83026	Charlot Barthelemy	Sarah Johnson	Cold Lead	Nov 30, 2023	CONFIRMED			Closed	1st Visit - Not a Client
83029	Magdalen Lamperti	Sarah Johnson	First Appointment	Nov 26, 2023	CONFIRMED			Open	1st Visit - Not a Client
83030	Reed Stittle	Michael Jordan	Disengaged	Jan 21, 2024	CONFIRMED			Closed	1st Visit - Not a Client
83032	Dan Burn	Sarah Johnson	Lost	Dec 24, 2023	CANCELLED			Closed	1st Visit - Not a Client

1 - 100 / 133

List of Leads / Clients

Contact ID Link	Client Name	Advisor	Meeting Category	Lead Stage	Lead State	Lead Source	Lead Owner	Meetings
128427	Joe Godin	Mehnur Baig	1st Visit - N...		Open		Janet Smith	1
128434	Jabbar Ahmad	Sarah Johnson	1st Visit - N...		Open		Janet Smith	1
128522	Varun Sethi	Sarah Johnson	1st Visit - N...		Open		Janet Smith	1
128526		Sarah Johnson	1st Visit - N...		Open		Janet Smith	1
82941	Giana Budik	Sarah Johnson	1st Visit - N...	Disengaged	Closed	Radio Show	Janet Smith	1
82945	Gideon Hospital	Michael Jordan	1st Visit - N...	Disengaged	Closed	Seminars and Events	Janet Smith	1
82996	Dosi Antonoyev	Sarah Johnson	1st Visit - N...	Qualified	Open	Generated Offline	Janet Smith	1
82997	Mei Blondell	Michael Jordan	1st Visit - N...	To be Qualified	Open	Radio Show	Janet Smith	1
82998	Josh Pontin	Janet Smith	1st Visit - N...	First Appointment	Open	Podcast	Janet Smith	1
Grand total								133

1 - 128 / 128