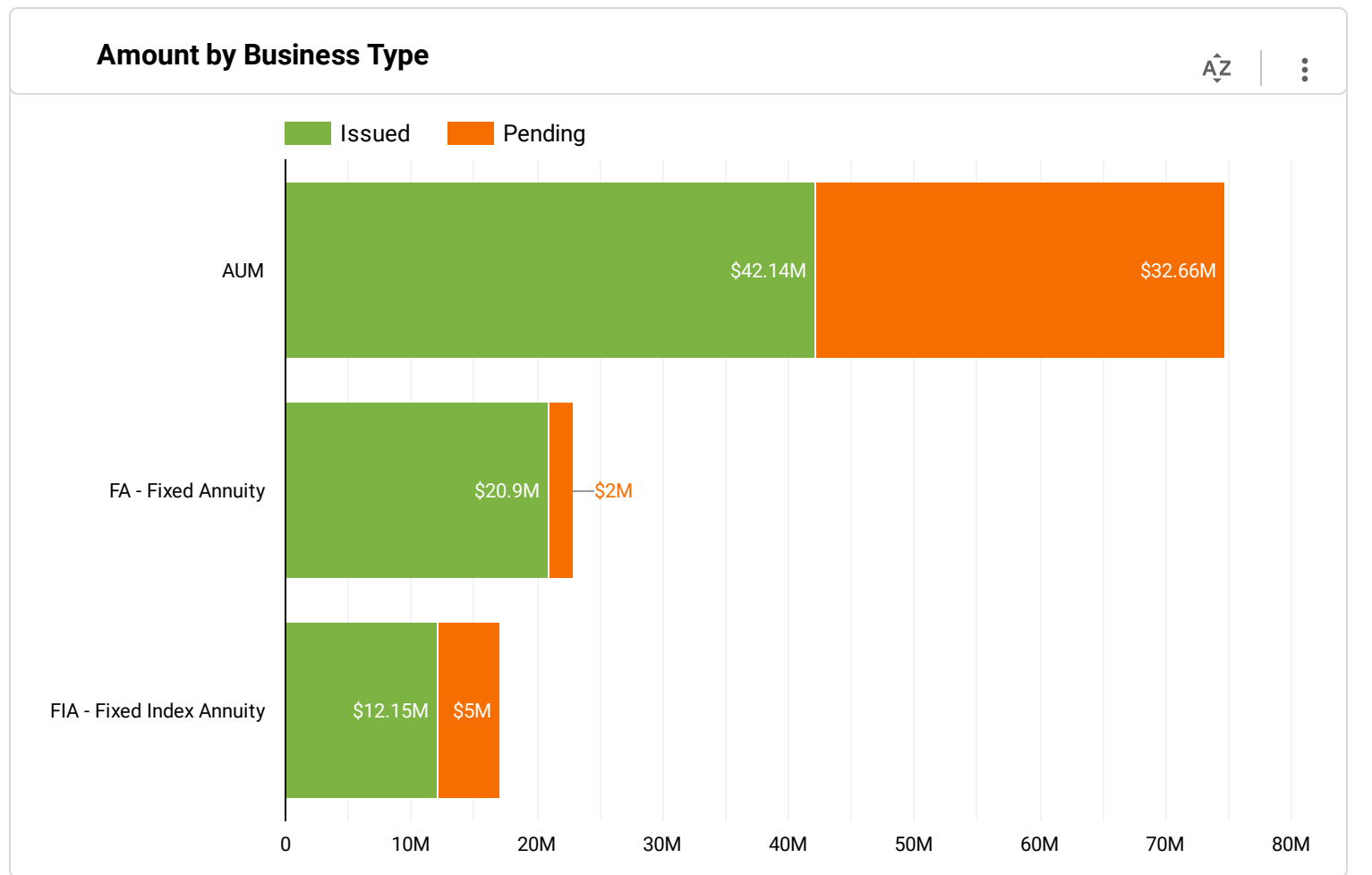
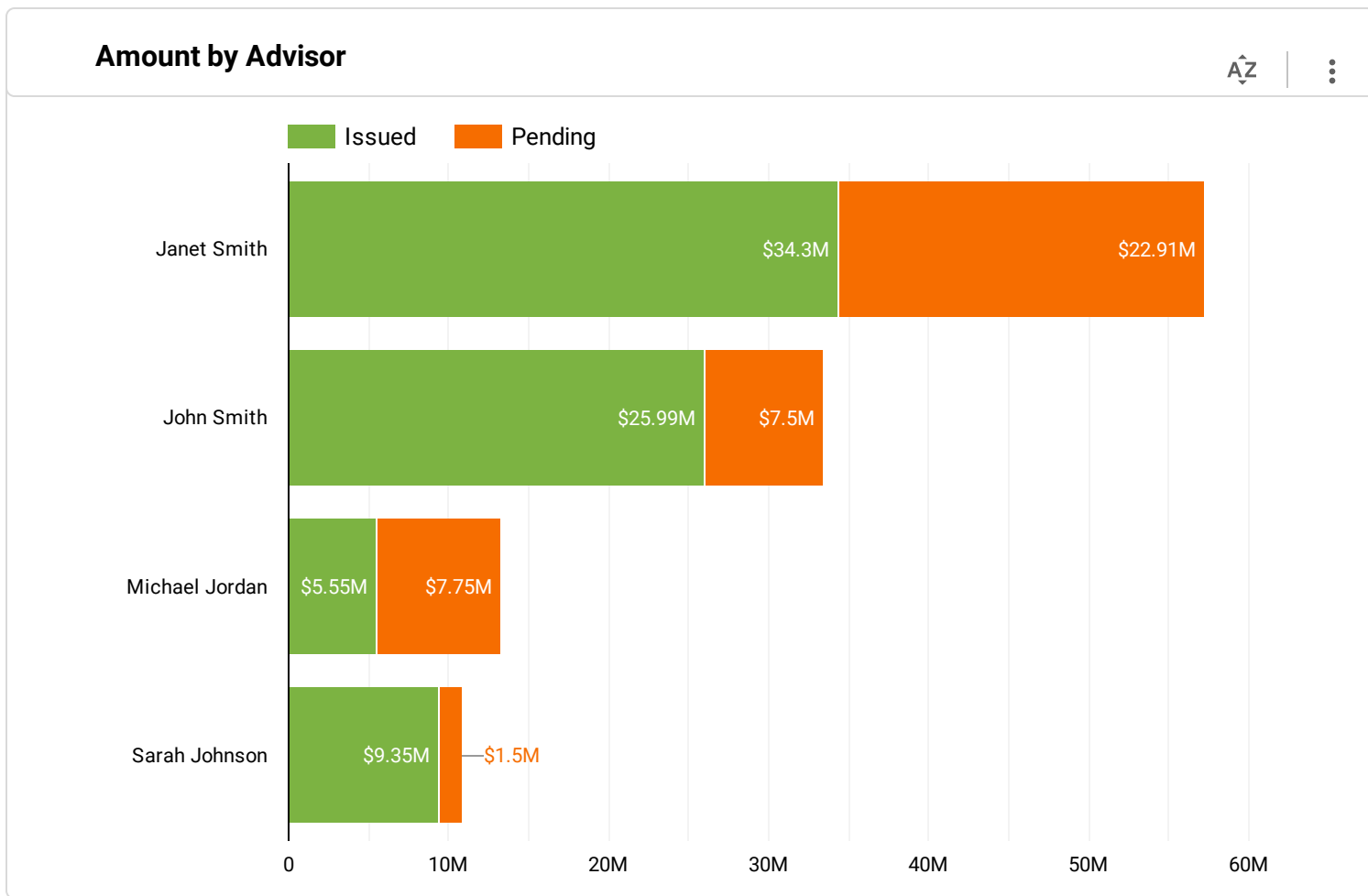
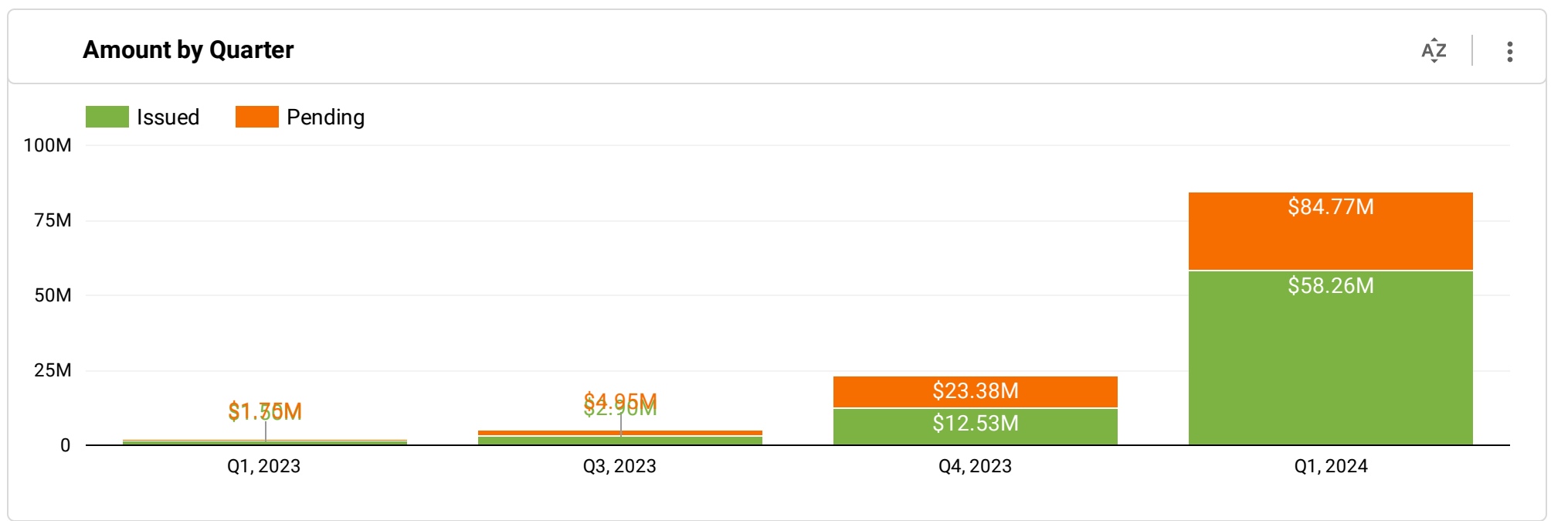
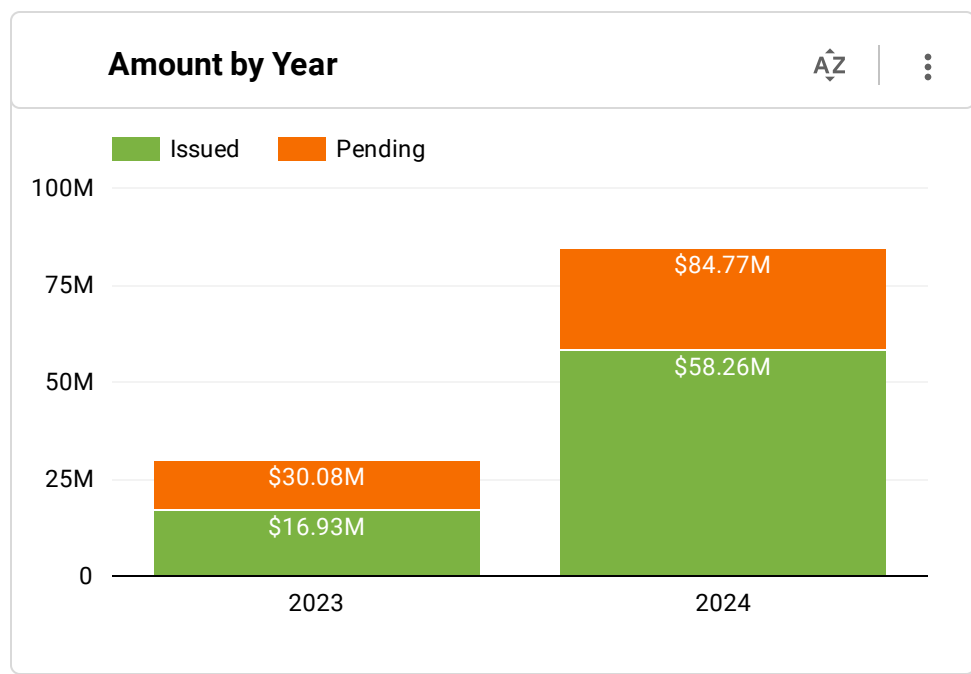
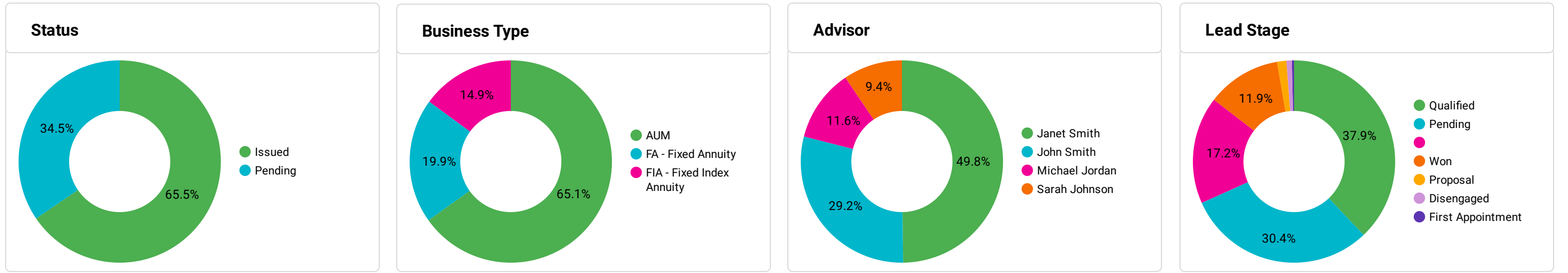
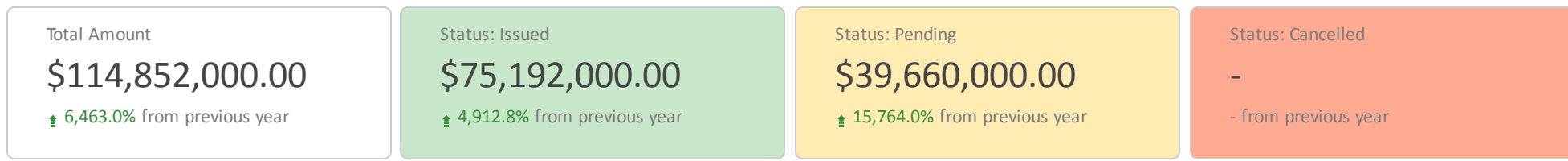


Source | Lead Stage | Insurance Company | Insurance Product | AUM Product | Feb 1, 2023 - Feb 27, 2024 | Reset Filters | Download (PDF)

Advisor Name | Status | Business Type | Insurance Product Type | AUM Product Type

Lead Status | Office Location

NOTE: This report will show all accounts (Issued, Pending, and Cancelled) and it is filtered based on App Signed Date



List of Accounts

	Contact ID Link	Contract Number	Business Type	Advisor Name	Client Name	Insurance Company	Insurance Product	Aum Product	App Signed Date	Account Issued Date	Status	Amount Issued
1.	83141	348978154	FIA - Fixed Index A...	Michael Jordan	Seymour Petrovsky	American Equity	Income Shield 10 (Op...		Feb 23, 2024	Feb 27, 2024	Issued	\$800,000
2.	83064	3221234	FA - Fixed Annuity	Janet Smith	Eliza Grout	Americo	Platinum Assure 3 Year		Feb 18, 2024	Feb 27, 2024	Issued	\$2,000,000
3.	138427	11111111	FA - Fixed Annuity	John Smith	kano kano	Aspida	Synergy Choice (3 yr.)		Feb 12, 2024	Feb 27, 2024	Issued	\$1,000,000
4.	83174	953795945	AUM	John Smith	Abbe Glazier		Growth Portfolio		Feb 24, 2024	Feb 26, 2024	Pending	\$500,000
5.	83537	122321	FA - Fixed Annuity	John Smith	Em Stirton	Americo	Platinum Assure 3 Year		Feb 13, 2024	Feb 26, 2024	Issued	\$400,000
6.	158880	122111123	FIA - Fixed Index A...	Janet Smith	Mustapha Ramadan	Ameritas	FlexMark Select		Feb 25, 2024	Feb 26, 2024	Issued	\$500,000
7.	192446	1112233	FA - Fixed Annuity	John Smith	Michael Stones	American Life	American Classic MY...		Feb 26, 2024	Feb 26, 2024	Issued	\$1,000,000
8.	169700	11111	FA - Fixed Annuity	John Smith	Katherine Beltran	Americo	Platinum Assure 3 Year		Feb 19, 2024	Feb 26, 2024	Issued	\$11,000,000
9.	83064	181192682	AUM	John Smith	Eliza Grout		Dividend Income M...		Feb 24, 2024	Feb 26, 2024	Issued	\$532,000
10.	83420	413511076	AUM	John Smith	Babbette Pirson		Dividend Income M...		Feb 23, 2024	Feb 25, 2024	Issued	\$532,000
11.	83260	164017979	AUM	Sarah Johnson	Cicily Gheeraert		Bluechip Growth M...		Feb 23, 2024	Feb 25, 2024	Issued	\$950,000
12.	83141	12211233	FA - Fixed Annuity	Janet Smith	Seymour Petrovsky	Americo	Platinum Assure 3 Year		Feb 24, 2024	Feb 25, 2024	Issued	\$1,200,000
13.	83279	753166689	AUM	John Smith	Chrysa Cottis		Strategic Index US		Feb 23, 2024	Feb 25, 2024	Issued	\$600,000
14.	83296	233990893	AUM	Janet Smith	Lisha Woodson		Dividend Income M...		Feb 22, 2024	Feb 24, 2024	Issued	\$2,500,000
15.	83562	564065402	AUM	Sarah Johnson	Paxon Sarra		Balanced Portfolio		Feb 20, 2024	Feb 22, 2024	Issued	\$200,000
16.	83234	727757536	FA - Fixed Annuity	Sarah Johnson	Dore Lawie	American National	Palladium (5yr.)		Feb 20, 2024	Feb 22, 2024	Issued	\$680,000
17.	83560	246813579	AUM	Janet Smith	Rudie Valenti		Balanced Portfolio		Feb 20, 2024	Feb 21, 2024	Issued	\$750,000
18.	83532	573829146	FIA - Fixed Index A...	Janet Smith	Fayth Bertson	Prudential	SurePath Income		Feb 20, 2024	Feb 21, 2024	Issued	\$1,200,000
19.	83407	327099488	AUM	John Smith	Elfreda Bartozzi		Strategic Index US		Feb 19, 2024	Feb 21, 2024	Issued	\$600,000
20.	83404	322437632	FA - Fixed Annuity	John Smith	Mahalia Minguet	XYZ Insurance	Fixed Indexed Annuity		Feb 19, 2024	Feb 21, 2024	Issued	\$150,000
21.	83332	987654321	AUM	Sarah Johnson	Jane Smith		Balanced Portfolio		Feb 17, 2024	Feb 20, 2024	Issued	\$200,000
											Grand total	\$114,852,000

Source	Lead Stage	Insurance Company	Insurance Product	AUM Product	Feb 1, 2023 - Feb 27, 2024
Advisor Name	Status	Business Type	Insurance Product Type	AUM Product Type	Reset Filters
Lead Status	Office Location	NOTE: This report will show all accounts (Issued, Pending, and Cancelled) and it is filtered based on App Signed Date			

Total Amount
\$114,852,000.00
 ↑ 6,463.0% from previous year

Status: Issued
\$75,192,000.00
 ↑ 4,912.8% from previous year

Status: Pending
\$39,660,000.00
 ↑ 15,764.0% from previous year

Status: Cancelled
 -
 - from previous year

Advisor Name	Status / Amount Issued		
	Issued	Pending	Grand total
Janet Smith	\$34,300,000.00	\$22,910,000.00	\$57,210,000.00
John Smith	\$25,992,000.00	\$7,500,000.00	\$33,492,000.00
Michael Jordan	\$5,550,000.00	\$7,750,000.00	\$13,300,000.00
Sarah Johnson	\$9,350,000.00	\$1,500,000.00	\$10,850,000.00
Grand total	\$75,192,000.00	\$39,660,000.00	\$114,852,000.00

Amount By Advisor & Quarter

Advisor Name	Account Issued Date (Year Quarter) / Status / Amount Issued											
	Q1, 2023		Q3, 2023			Q4, 2023			Q1, 2024			Grand total
	Issued	Pending	Issued	Pending	Cancelled	Issued	Pending	Cancelled	Issued	Pending	Cancelled	
John Smith	\$1.5M	-	\$1.01M	\$1M	-	\$1.06M	\$2M	-	\$22.45M	\$4.5M	-	\$33.52M
Janet Smith	-	-	-	-	-	\$5.95M	\$2.4M	-	\$20.85M	\$1.6M	-	\$30.8M
Michael Jordan	-	-	\$1.9M	\$800K	-	\$950K	\$2.3M	-	\$2.7M	\$4.65M	-	\$13.3M
Sarah Johnson	-	\$250K	-	\$250K	\$3K	\$2.98M	\$250K	\$2K	\$6.37M	\$750K	\$1K	\$10.86M
Grand total	\$1.5M	\$250K	\$2.91M	\$2.05M	\$3K	\$10.94M	\$6.95M	\$2K	\$52.37M	\$11.5M	\$1K	\$88.48M

Amount Per Source by Status

Source	Status / Issued			
	Issued	Pending	Cancelled	Grand total
null	\$13.5M			\$13.5M
Google Ads	\$7.23M	\$1M	\$2K	\$8.23M
Google Search (Organic)	\$5.72M	\$1.55M		\$7.27M
Chat on Website	\$3.45M	\$3.65M		\$7.1M
Generated Offline	\$6.31M	\$500K		\$6.81M
Email Marketing	\$5.35M	\$1.3M	\$1K	\$6.65M
Referrals	\$5.56M	\$1M		\$6.56M
Google My Business	\$1.93M	\$3.85M	\$1K	\$5.78M
Seminars and Events	\$4.48M	\$1M	\$1K	\$5.48M
Google Ads (Local Services)	\$1.64M	\$2.55M		\$4.19M
Radio Show	\$3.36M	\$800K	\$1K	\$4.16M
YouTube	\$3.36M	\$750K		\$4.11M
Grand total	\$67.72M	\$20.75M	\$6K	\$88.48M

List of Accounts

Contact ID Link	Contract Number	Business Type	Advisor Name	Client Name	Insurance Company	Insurance Product	Aum Product	App Signed Date	Account Issued Date	Status	Amount Issued
1. 83141	348978154	FIA - Fixed Index A...	Michael Jordan	Seymour Petrovsky	American Equity	Income Shield 10 (Op...		Feb 23, 2024	Feb 27, 2024	Issued	\$800,000
2. 83064	3221234	FA - Fixed Annuity	Janet Smith	Eliza Grout	Americo	Platinum Assure 3 Year		Feb 18, 2024	Feb 27, 2024	Issued	\$2,000,000
3. 138427	11111111	FA - Fixed Annuity	John Smith	kano kano	Aspida	Synergy Choice (3 yr.)		Feb 12, 2024	Feb 27, 2024	Issued	\$1,000,000
4. 83174	953795945	AUM	John Smith	Abbe Glazier		Growth Portfolio		Feb 24, 2024	Feb 26, 2024	Pending	\$500,000
5. 83537	122321	FA - Fixed Annuity	John Smith	Em Stilton	Americo	Platinum Assure 3 Year		Feb 13, 2024	Feb 26, 2024	Issued	\$400,000
6. 158880	122111123	FIA - Fixed Index A...	Janet Smith	Mustapha Ramadan	Ameritas	FlexMark Select		Feb 25, 2024	Feb 26, 2024	Issued	\$500,000
7. 192446	1112233	FA - Fixed Annuity	John Smith	Michael Stones	American Life	American Classic MY...		Feb 26, 2024	Feb 26, 2024	Issued	\$1,000,000
8. 169700	11111	FA - Fixed Annuity	John Smith	Katherine Beltran	Americo	Platinum Assure 3 Year		Feb 19, 2024	Feb 26, 2024	Issued	\$11,000,000
9. 83064	181192682	AUM	John Smith	Eliza Grout		Dividend Income M...		Feb 24, 2024	Feb 26, 2024	Issued	\$532,000
10. 83420	413511076	AUM	John Smith	Babbette Pirson		Dividend Income M...		Feb 23, 2024	Feb 25, 2024	Issued	\$532,000
11. 83260	164017979	AUM	Sarah Johnson	Cicily Gheeraert		Bluechip Growth M...		Feb 23, 2024	Feb 25, 2024	Issued	\$950,000
12. 83141	12211233	FA - Fixed Annuity	Janet Smith	Seymour Petrovsky	Americo	Platinum Assure 3 Year		Feb 24, 2024	Feb 25, 2024	Issued	\$1,200,000
13. 83279	753166689	AUM	John Smith	Chrysa Cottis		Strategic Index US		Feb 23, 2024	Feb 25, 2024	Issued	\$600,000
14. 83296	233990893	AUM	Janet Smith	Lisha Woodson		Dividend Income M...		Feb 22, 2024	Feb 24, 2024	Issued	\$2,500,000
15. 83562	564065402	AUM	Sarah Johnson	Paxon Sarra		Balanced Portfolio		Feb 20, 2024	Feb 22, 2024	Issued	\$200,000
16. 83234	727757536	FA - Fixed Annuity	Sarah Johnson	Dore Lawie	American National	Palladium (5yr.)		Feb 20, 2024	Feb 22, 2024	Issued	\$680,000
17. 83560	246813579	AUM	Janet Smith	Rudie Valenti		Balanced Portfolio		Feb 20, 2024	Feb 21, 2024	Issued	\$750,000
18. 83532	573829146	FIA - Fixed Index A...	Janet Smith	Fayth Bertson	Prudential	SurePath Income		Feb 20, 2024	Feb 21, 2024	Issued	\$1,200,000
19. 83407	327099488	AUM	John Smith	Elfreda Bartozzi		Strategic Index US		Feb 19, 2024	Feb 21, 2024	Issued	\$600,000
20. 83404	322437632	FA - Fixed Annuity	John Smith	Mahalia Minguet	XYZ Insurance	Fixed Indexed Annuity		Feb 19, 2024	Feb 21, 2024	Issued	\$150,000
21. 83332	987654321	AUM	Sarah Johnson	Jane Smith		Balanced Portfolio		Feb 17, 2024	Feb 20, 2024	Issued	\$200,000
Grand total											\$114,852,000

Source	Lead Stage	Insurance Company	Insurance Product	AUM Product	Feb 1, 2023 - Feb 27, 2024
Advisor Name	Status	Business Type	Insurance Product Type	AUM Product Type	Reset Filters
Lead Status	Office Location	NOTE: This report will show all accounts (Issued, Pending, and Cancelled) and it is filtered based on App Signed Date			

Total Amount
\$114,852,000.00
 ↑ 6,463.0% from previous year

Status: Issued
\$75,192,000.00
 ↑ 4,912.8% from previous year

Status: Pending
\$39,660,000.00
 ↑ 15,764.0% from previous year

Status: Cancelled
 -
 - from previous year

Amount Issued by Business Type

Business Type	Status / Amount Issued		Grand total
	Issued	Pending	
AUM	\$42,142,000.00	\$32,660,000.00	\$74,802,000.00
FA - Fixed Annuity	\$20,900,000.00	\$2,000,000.00	\$22,900,000.00
FIA - Fixed Index Annuity	\$12,150,000.00	\$5,000,000.00	\$17,150,000.00
Grand total	\$75,192,000.00	\$39,660,000.00	\$114,852,000.00

Amount By Type & Quarter

Business Type	Account Issued Date (Year Quarter) / Status / Amount Issued											Grand total
	Q1, 2023		Q3, 2023			Q4, 2023			Q1, 2024			
	Issued	Pending	Issued	Pending	Cancelled	Issued	Pending	Cancelled	Issued	Pending	Cancelled	
AUM	\$1.5M	-	\$1M	\$1M	-	\$7.65M	\$5.9M	-	\$24.49M	\$8.35M	-	\$49.89M
FA - Fixed Annuity	-	\$250K	-	\$250K	-	\$1.13M	\$250K	-	\$19.77M	\$750K	-	\$22.4M
FIA - Fixed Index Annuity	-	-	\$1.9M	\$800K	-	\$2.15M	\$800K	-	\$8.1M	\$2.4M	-	\$16.15M
Financial planning only	-	-	\$10K	-	\$3K	\$10K	-	\$2K	\$10K	-	\$1K	\$36K
Grand total	\$1.5M	\$250K	\$2.91M	\$2.05M	\$3K	\$10.94M	\$6.95M	\$2K	\$52.37M	\$11.5M	\$1K	\$88.48M

Amount By Type Per Source

Business Type	Source / Issued												Grand total
	null	Google Ads	Google Sea...	Chat on We...	Generated ...	Email Mark...	Referrals	Google My ...	Seminars a...	Google Ads ...	Radio Show	YouTube	
AUM		\$7.28M	\$4.55M	\$4.55M	\$4.31M	\$1.7M	\$4.25M	\$4.73M	\$4.83M	\$4.03M	\$2.15M	\$2.5M	\$49.89M
FA - Fixed Annuity	\$13M		\$1.51M		\$2.5M	\$1.2M	\$150K	\$150K	\$650K	\$150K		\$1.61M	\$22.4M
FIA - Fixed Index Annuity	\$500K	\$950K	\$1.2M	\$2.55M		\$3.75M	\$2.15M	\$900K			\$2M		\$16.15M
Financial planning only		\$2K	\$5K			\$1K	\$5K	\$1K	\$1K	\$10K	\$6K		\$36K
Grand total	\$13.5M	\$8.23M	\$7.27M	\$7.1M	\$6.81M	\$6.65M	\$6.56M	\$5.78M	\$5.48M	\$4.19M	\$4.16M	\$4.11M	\$88.48M

List of Accounts

Contract Number	Business Type	Advisor Name	Client Name	Insurance Company	Insurance Product	Aum Product	App Signed Date	Account Issued Date	Status	Amount Issued
1. 348978154	FIA - Fixed Index An...	Michael Jordan	Seymour Petrovsky	American Equity	Income Shield 10 (Opti...		Feb 23, 2024	Feb 27, 2024	Issued	\$800,000
2. 3221234	FA - Fixed Annuity	Janet Smith	Eliza Grout	Americo	Platinum Assure 3 Year		Feb 18, 2024	Feb 27, 2024	Issued	\$2,000,000
3. 11111111	FA - Fixed Annuity	John Smith	kano kano	Aspida	Synergy Choice (3 yr.)		Feb 12, 2024	Feb 27, 2024	Issued	\$1,000,000
4. 953795945	AUM	John Smith	Abbe Glazier			Growth Portfolio	Feb 24, 2024	Feb 26, 2024	Pending	\$500,000
5. 122321	FA - Fixed Annuity	John Smith	Em Stilton	Americo	Platinum Assure 3 Year		Feb 13, 2024	Feb 26, 2024	Issued	\$400,000
6. 122111123	FIA - Fixed Index An...	Janet Smith	Mustapha Ramadan	Ameritas	FlexMark Select		Feb 25, 2024	Feb 26, 2024	Issued	\$500,000
7. 1112233	FA - Fixed Annuity	John Smith	Michael Stones	American Life	American Classic MYG...		Feb 26, 2024	Feb 26, 2024	Issued	\$1,000,000
8. 11111	FA - Fixed Annuity	John Smith	Katherine Beltran	Americo	Platinum Assure 3 Year		Feb 19, 2024	Feb 26, 2024	Issued	\$11,000,000
9. 181192682	AUM	John Smith	Eliza Grout			Dividend Income Mo...	Feb 24, 2024	Feb 26, 2024	Issued	\$532,000
10. 413511076	AUM	John Smith	Babbette Pirson			Dividend Income Mo...	Feb 23, 2024	Feb 25, 2024	Issued	\$532,000
11. 164017979	AUM	Sarah Johnson	Cicily Gheeraert			Bluechip Growth Model	Feb 23, 2024	Feb 25, 2024	Issued	\$950,000
12. 12211233	FA - Fixed Annuity	Janet Smith	Seymour Petrovsky	Americo	Platinum Assure 3 Year		Feb 24, 2024	Feb 25, 2024	Issued	\$1,200,000
13. 753166689	AUM	John Smith	Chrysa Cottis			Strategic Index US	Feb 23, 2024	Feb 25, 2024	Issued	\$600,000
14. 233990893	AUM	Janet Smith	Lisha Woodson			Dividend Income Mo...	Feb 22, 2024	Feb 24, 2024	Issued	\$2,500,000
15. 564065402	AUM	Sarah Johnson	Paxon Sarra			Balanced Portfolio	Feb 20, 2024	Feb 22, 2024	Issued	\$200,000
16. 727757536	FA - Fixed Annuity	Sarah Johnson	Dore Lawie	American National	Palladium (5yr.)		Feb 20, 2024	Feb 22, 2024	Issued	\$680,000
17. 246813579	AUM	Janet Smith	Rudie Valenti			Balanced Portfolio	Feb 20, 2024	Feb 21, 2024	Issued	\$750,000
18. 573829146	FIA - Fixed Index An...	Janet Smith	Fayth Bertson	Prudential	SurePath Income		Feb 20, 2024	Feb 21, 2024	Issued	\$1,200,000
19. 327099488	AUM	John Smith	Elfreda Bartozzi			Strategic Index US	Feb 19, 2024	Feb 21, 2024	Issued	\$600,000
20. 322437632	FA - Fixed Annuity	John Smith	Mahalia Minguet	XYZ Insurance	Fixed Indexed Annuity		Feb 19, 2024	Feb 21, 2024	Issued	\$150,000
21. 987654321	AUM	Sarah Johnson	Jane Smith			Balanced Portfolio	Feb 17, 2024	Feb 20, 2024	Issued	\$200,000
Grand total										\$114,852,000