

## Prospect Profile Sheet

Prospect Name: \_\_\_\_\_ Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: (W) \_\_\_\_\_ (H) \_\_\_\_\_ (C) \_\_\_\_\_

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

Current Employer: \_\_\_\_\_

Title: \_\_\_\_\_ Territory: \_\_\_\_\_ Start Date: \_\_\_\_\_

Year started industry \_\_\_\_\_ and with what company? \_\_\_\_\_

What % is FHA/VA \_\_\_\_\_ Conventional \_\_\_\_\_ Jumbo \_\_\_\_\_ BC/Niche \_\_\_\_\_

What are your TOP 5 PRODUCTS you sell? \_\_\_\_\_

Best Income Year \_\_\_\_\_ \$ \_\_\_\_\_ K - Your Income Goal: \_\_\_\_\_

How many referral sources send you business? \_\_\_\_\_ (realtors/builders)

How many customers are in your database? \_\_\_\_\_

What is the % Purchases V.S. Refi's: \_\_\_\_\_ % Average Loan Amount: \_\_\_\_\_ K

### Past 3 years Volume

20\_\_ Expected Personal volume: \_\_\_\_\_ Million Expected w-2 income \_\_\_\_\_ K

20\_\_ YTD Volume \_\_\_\_\_ M/thru \_\_\_\_\_ 20\_\_ YTD Income \$ \_\_\_\_\_ K

20\_\_ Personal \_\_\_\_\_ M 20\_\_ W-2 earnings \_\_\_\_\_

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Base salary/Draw? \_\_\_\_\_ Commission \_\_\_\_\_

### Previous Employment (Try for 5 years)

Company \_\_\_\_\_ Position \_\_\_\_\_ Tenure \_\_\_\_\_

Reason you left: \_\_\_\_\_

Motivations/Comments: \_\_\_\_\_

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