

Medicare Supplement Telephonic Lead Purchase Agreement

Option 1—Agent call back leads. \$10 per lead.

Lead vendor calls targeted area and sets up a return call from agent to Medicare Beneficiary. Leads are provided daily via drop box. Agent will receive an excel file with every lead from that day as well as a recording of the call for each lead. Agent is responsible to listen to recordings for quality assurance and provide feedback or changes to scripting as needed. Please allow up to 1 week for setup.

Age (can choose multiple)	Income	Location
<input type="checkbox"/> T65 (very limited)	<input type="checkbox"/> \$0-13,000	<hr/>
<input type="checkbox"/> 66-70	<input type="checkbox"/> \$13,000—30,000	<hr/>
<input type="checkbox"/> 71-75	<input type="checkbox"/> \$30,000—50,000	<hr/>
<input type="checkbox"/> 76-80	<input type="checkbox"/> \$50,000—100,000	<hr/>
<input type="checkbox"/> 81+	<input type="checkbox"/> \$100,000 +	<hr/>

Option 2—Live Transfer Leads. \$15 per lead.

Lead vendor calls targeted area and sets up a return call from agent to Medicare Beneficiary. Leads are transferred to agent live during selected time frames. Agent is responsible for being available for transfers. Agent is responsible to listen to recordings for quality assurance and provide feedback or changes to scripting as needed. Please allow up to 1 month for setup.

Age (can choose multiple)	Income	Location
<input type="checkbox"/> T65 (very limited)	<input type="checkbox"/> \$0-13,000	<hr/>
<input type="checkbox"/> 66-70	<input type="checkbox"/> \$13,000—30,000	<hr/>
<input type="checkbox"/> 71-75	<input type="checkbox"/> \$30,000—50,000	<hr/>
<input type="checkbox"/> 76-80	<input type="checkbox"/> \$50,000—100,000	<hr/>
<input type="checkbox"/> 81+	<input type="checkbox"/> \$100,000 +	<hr/>

Availability	Times	
		<input type="checkbox"/> 2-3pm
<input type="checkbox"/> Day of Week	<input type="checkbox"/> 8-9am	<input type="checkbox"/> 3-4pm
<input type="checkbox"/> Monday	<input type="checkbox"/> 9-10am	<input type="checkbox"/> 4-5pm
<input type="checkbox"/> Tuesday	<input type="checkbox"/> 10-11am	<input type="checkbox"/> 5-6pm
<input type="checkbox"/> Wednesday	<input type="checkbox"/> 11am-12pm	<input type="checkbox"/> 6-7pm
<input type="checkbox"/> Thursday	<input type="checkbox"/> 12-1pm	<input type="checkbox"/> 7-8pm
<input type="checkbox"/> Friday	<input type="checkbox"/> 1-2pm	

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Sample Scripting

Hi, this is _____ with Medicare Supplemental Enrolment. Is _____ available?

We're contacting people on Medicare in [Customer's State] as more affordable Medicare Supplemental plans have recently become available.

Are you currently on Medicare? [Must answer yes]

As lower rates may now be available, would you be interested to see what new affordable Supplemental plans that you qualify for? [Must answer yes]

Great! Since plan coverage's and rates are always changing, there may be better options for you that provide more coverage for less money. I just need to verify a few things first.

1. Are you 64 years of age or older? [Must answer Yes]
2. Are you currently enrolled in Medicare parts A & B? [Must answer Yes]
 - a. [If not sure, ask if they have a "red white and blue card". If yes, they are eligible.]
3. Are you currently on Medicaid or Med Advantage? [Must answer No]
4. Confirm address.

Ok Great. Now one of our Medicare specialist will give you a call and provide you more information about this in next 24-48 hours, even if your number is listed on National or Federal Do Not Call list. Would that be okay?

Perfect. Have a great day.

Credit Card Authorization

Credit Card Information				
Card Type:	<input type="checkbox"/> MasterCard	<input type="checkbox"/> VISA	<input type="checkbox"/> Discover	<input type="checkbox"/> AMEX
	<input type="checkbox"/> Other _____			
Cardholder Name (as shown on card): _____				
Card Number: _____				
Expiration Date (mm/yy): _____				
Cardholder ZIP Code (from credit card billing address): _____				

I, _____ authorize Callvy BPO to charge my credit card above for agreed upon purchases. I understand that my information will be saved to file for future transactions on my account.

Callback Leads _____ x \$10 + Live Transfer Leads _____ \$15 = Total Cost Authorized _____.

Name _____ Siganture _____ Date _____