

Prospect Status Report *(Keeping tabs on your prospects!)*

****** Your next status report will be Thursday, March 14. Contact us if we can help in the meantime. ******

Green	Immediate Business
Yellow	Mid-term Timeframe
Red	Long Way Away

1	John & Jill Smith	Chad's Notes:	Your Notes:
		3/5/2014 - I spoke to client; they are ready to list their home and begin searching for the up-leg home. 2/14/2014 - John & Jill are just returning from vacation and still getting settled back home. We'll be speaking again in a couple weeks.	mm/dd/yy - Update

2	Joe Schmo	Chad's Notes:	Your Notes:
		3/7/2014 - It looks like Joe is in a holding pattern until he can pay-off some of his debt and save for a down payment. He'll be using our financial coaching services to get a better understanding of his money.	mm/dd/yy - Update

Best Regards,

Chad Peshke - *Financial Services Provider*

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