

Memory Jogger List For Leads And Referrals

Professionals

Accounting
 Ad Agency
 Allergist
 Attorney
 Bank Loan Officer
 Business Owner
 Chiropractor
 Church Bulletin
 Credit Union
 Dentist
 Insurance Agent
 Mortgage Broker
 Mortician
 Optometrist
 Pharmacist
 Police Officer
 Professors
 Psychiatrist
 Real Estate Agent
 Salespeople
 Teachers
 Veterinarian

Clubs/Associations

Apartments
 Bingo
 Book Club
 Bowling League
 Chamber of Commerce
 Church
 College Directory
 Elks
 Fishing Buddies
 Golf
 Gym/Health Club
 Internet
 Investment Club
 Leagues
 Mommy & Me
 Moose Lodge
 PTA
 PTO
 Seniors Clubs

Centers of Influence

Accountant
 Attorney
 Dentist
 Doctor
 Headhunter
 Human Resources
 Loan Officer
 Outplacement
 Pastor
 Priest
 Rabbi
 SBA

Places Frequented

Church
 Coffee Shops
 Mosque
 Synagogue
 Department Stores
 Dry Cleaners
 Florist
 Gas Station
 Gym/Health Club
 Hotel
 Ma/Pa Shops
 Manicurist
 Mechanic
 Movie Rental Store
 Oil Change
 Pizza Shop
 Restaurants
 Shopping Places
 Sporting Events
 Tanning Salon
 Video Store

Personal

Alumni Association
 Anniversary
 Barber/Beautician
 Carpenter
 Caterer
 Community Organization
 Contractor
 DJ
 Day Care
 Family:
 Father/Mother
 Brother/Sister
 Father-in-law
 Mother-in-law
 Brother-in-law
 Sister-in-law
 Aunt/Uncle
 Cousin
 Niece/Nephew
 Grandfather
 Grandmother
 Fraternity Alumni
 Funeral
 Hair Stylist
 Landlord
 Landscaper
 Limo (Co./Driver)
 Mailman
 Neighbors
 Paper Deliverer
 Parents' Co-Workers
 Parents' Friends
 Photographers
 Repair People
 Showers
 Sorority Alumni
 Tanning Salon
 Tenant
 Trash Hauler
 Travel Agent
 Videographer
 Wedding List

Hobbies/Sports

Bowl With
 Hunt With
 Golf With
 Fish With
 Tennis With
 Ski With
 Throw Darts With
 Softball With
 Baseball With
 Football With
 Soccer With
 Racquetball With
 Handball With
 Swim With



Top Prospects

Identify your Top Eligible Prospects:

(Include from list below how you believe client may be qualified for investment.)

Do you know anyone who recently changed jobs? If so, their previous 401K is likely underperforming and can be used to purchase Real Estate with No Tax Consequence!

1) _____	Qualified? _____	10) _____	Qualified? _____
2) _____	Qualified? _____	11) _____	Qualified? _____
3) _____	Qualified? _____	12) _____	Qualified? _____
4) _____	Qualified? _____	13) _____	Qualified? _____
5) _____	Qualified? _____	14) _____	Qualified? _____
6) _____	Qualified? _____	15) _____	Qualified? _____
7) _____	Qualified? _____	16) _____	Qualified? _____
8) _____	Qualified? _____	17) _____	Qualified? _____
9) _____	Qualified? _____	18) _____	Qualified? _____

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|----------------------------------|---------------------------------------|-------------------|
| 1) <i>Traditional IRA</i> | 2) <i>Roth IRA</i> | 3) <i>SEP IRA</i> |
| 4) <i>SIMPLE IRA</i> | 5) <i>401(k)</i> | 6) <i>Cash</i> |
| 7) <i>Health Savings Account</i> | 8) <i>Educational Savings Account</i> | 9) <i>403(b)</i> |
| 10) <i>Defined Benefits</i> | 11) <i>1031 Exchange</i> | 12) <i>Trusts</i> |