EQUIS RETIREMENT SOLUTIONS

RETIREMENT SOLUTIONS SPECIALIST REFERRAL TRACKER

TO EARN CREDIT, RETURN SHEET TO equisretirementsolutions@equisfinancial.com EACH WEEK!

Agent Name: **EF#:** **RM:**

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Date Referral Sent	Client Name	Client Phone #	Client Email	Client Address	Account Type	Lead Type	Primary Interest	Referred to Name	Referred to Email	Referred Via:
EXAMPLE: 1/30/2022	Joe Q Public	(828) 555-1212	joe@email.com	123 Client St, Tacoma, NC 28805	401k	Purchased	Tax-Free Income	John Agent	equisjohn@email.com	Email