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# Mortgage Protection

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## Catalog of Leads



**LeadConcepts**  
design • print • ship  
Direct Mail Marketing That Gets Results



# ABOUT LEAD CONCEPTS, INC

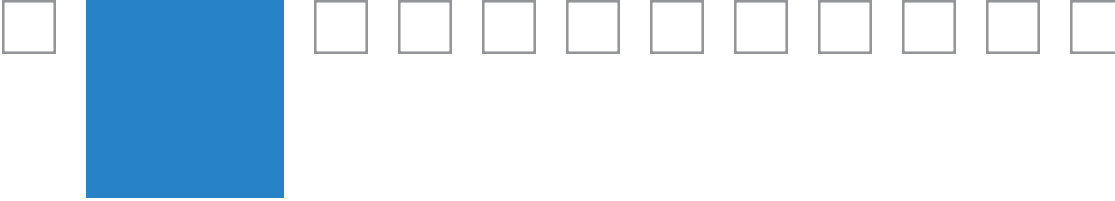
Lead Concepts, Inc. was founded in 1991 with the mission to provide our customers with the best service and products to grow their business. Our experience and longevity in the lead generation industry is what sets us apart from our competition.

We began in a 3,000 sq. ft. office space and have since grown into our own 35,000 sq. ft. industrial building. Our equipment has expanded from simple one-color printing presses to multi-color presses, in both digital and offset formats, as well as machines for inserting, binding, perforating, tabbing, and high-speed folding. Our investment in the production and control of our products allows us to ensure that our quality is second to none.

Lead Concepts, Inc. keeps a long-term database of mail pieces, response rates, and demographics that provide reporting capabilities to demonstrate the best leads, targeted areas, and responder data. Our customers can rely on us to provide accurate and up-to-date information prior to their mailing to better anticipate their response. We know how our leads should perform and we stand behind our products.

To deliver our data to our customers, Lead Concepts, Inc. provides customer access to a customized lead delivery portal; this allows our customers a real-time view of their responses. The system displays the scanned returned mailers along with the recorded data about the prospect. This system can be used to internally manage leads as well as to export to an individual agent or company's existing CRM. We also offer customization and automation so that these transitions can be seamless and offer the fastest and most effortless boost to the business.

After 25 years of business, we are well-informed about our customers' unique business needs. From state compliance regulations to CMS guidelines, we have experience in how the industry regulators examine advertising. These details help our customers know that when they are mailing with Lead Concepts, they are using a successful, full-service operation to meet their needs.



## PRODUCTS & SERVICES

### Lead Generation

25 years of experience = proven results

- Medicare Related Coverage
- Final Expense
- Mortgage Protection
- Long Term Care
- Annuities
- Seminars / Optional Telephone Reservation Service
- Reverse Mortgage
- Required Minimum Distribution

### Funeral Homes

### Real Estate

### Agent Recruiting

### List Generation

### Custom Designed Mailers

### Every Door Direct Mail

### Personalized Promotional Products

### Trade Show Display Products

### Graphic Design

### Online Portal Access

Once the leads are mailed back our team scans them into our system. The scanned images are then emailed to the client and placed in client portal. Each client is supplied with a login and password for their portal. The portal is custom to each client and gives them the ability to:

- Overview of several agents lead responses in one place
- Assign leads to agents within your agency
- Track agents number of lead calls, appointments and sales
- View new leads received for each order
- View previous orders/historical data
- Export spreadsheets of responses
- Export PDF files of all or individual leads



## LEAD CONCEPTS' LEAD LINK

**LEAD LINK - Dashboard**  
Welcome, ACCOUNT OWNER: JOHN SMITH, to the Lead Concepts LEAD LINK system.

**37** New Leads  
**109** Total Available Leads  
**3** Open Tasks

**Agent Leads Summary**

Agent	New	Active	Success	Declined	Inactive	Total Leads
Account Owner: John Smith	2	-	-	-	-	2
Agent Bobby Jones	5	1	-	-	-	6
Agent: Henry Samuelson	1	31	9	2	-	43
Agent: Michael Jones	-	24	5	-	-	29
Manager: Denise Williamson	5	-	-	-	-	5
Manager: Liz Rogers	24	-	-	-	-	24
[NOT ASSIGNED]	-	-	-	-	-	-

**Today's Tasks**

Open	Task	Lead	Due Date
✓	Mail information	KANDACE BUHRMAN	7/7/2018
✓	Call back @10 am	Nocto Michael	7/8/2018
✓	Call about plan options	PATRICIA HARRINGTON	8/1/2018

SHOWING 3 OF 3 OPEN TASKS

**New Leads By Order**

INVOICE #	PRODUCT CODE	NOTES	# NEW	ORDER #SENT	ORDER #RETURN	ORDER %RETURN	ORDER LAST RETURN
168257	5 - Senior Healthcare		3	500	9	1.8%	05/30/2018
175017	5 - Senior Healthcare		1	100	20	20%	05/01/2017

- **Secure login to view responses**
- **View individual lead image and details**
- **View all orders and response rates**
- **Easily download responses, or export directly to your CRM**
- **Populated on a daily basis**
- **Assign and manage tasks**

# Mortgage Protection Life Insurance

XXXX-XM-6

1.0 – 2.0% Response Rates  
New Data Available Weekly!

Recommended Demographics:  
All New Home Purchases & Refi's

FINAL NOTICE TO <<FIRSTN>> <<LASTN>>  
COMPLETE AND RETURN

Date: <<MtgDate>>

RE: <<Lender>>  
<<FirstName>> <<LastName>>  
<<Street>>  
<<City>> <<State>> <<Zip>>-<<Zip+4>>  
\* <<Zip>>-<<Zip+4>>-<<DPBC>>\*

Dear <<FirstN>>,

You are invited to participate in a low cost Mortgage Life Insurance Protection Program, which your \$<<MtgAmnt>> loan in case of death or disability. **Without this plan, your family would make your monthly mortgage payments.**

<<FirstN>>, your benefits can include:

- **DEATH** – Pays off your \$<<MtgAmnt>> loan in the event of your death.
- **DISABILITY** – Provides cash to make your mortgage payment if you cannot work.
- **CHRONIC ILLNESS OR CRITICAL ILLNESS** – Can pay a portion of your death benefit if you are diagnosed with a covered illness.
- **LEVEL PREMIUM** – Costs do not increase.
- **MONEY BACK OPTION** – Returns all of your premiums if benefits are not used.
- **KNOWING THE <<LastN>> FAMILY WILL NOT LOSE THEIR HOME.**

For complete details at no cost or obligation, please complete and return this form in the enclosed postage paid envelope.

<<FirstN>> <<LastN>> <<Street>> <<City>> <<State>> <<Zip>>      MTG AMOUNT:  
LENDER: <<Lender>>      \$<<MtgAmnt>>

Borrower      Co-Borrower / Spouse

Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_  
Male  Female

\_\_\_\_/\_\_\_\_/\_\_\_\_  
Male  Female

Phone # (      ) \_\_\_\_\_ Work # (      ) \_\_\_\_\_

Best time to call: \_\_\_\_\_ Home  Work  Cell # (      ) \_\_\_\_\_

First Name of the person completing this form: \_\_\_\_\_

Carriers to obtain coverage will vary and are not underwritten or affiliated with the lender. Products and rider availability varies from state to state. Plans include Term, Universal Life and Disability Income. Information obtained thru public records. Information provided by <<Agent Name>>.

XXXX-XM-6

PSRRT STD  
US POSTAGE  
PAID  
PERMIT #170  
76051

RE: <<Lender>>  
<<FirstName>> <<LastName>>  
<<Street>>  
<<City>> <<State>> <<Zip>>-<<Zip+4>>  
\* <<Zip>>-<<Zip+4>>-<<DPBC>>\*

NO POSTAGE  
NECESSARY  
IF MAILED  
IN THE  
UNITED STATES

**BUSINESS REPLY MAIL**  
FIRST-CLASS MAIL PERMIT NO. 337 IRVING, TX

POSTAGE WILL BE PAID BY ADDRESSEE  
SEND REQUEST TO:  
PO BOX 154329  
IRVING TX 75015-9918



Call Lead Concepts Today

**800-283-0187**

*Leads that get results.*



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