

## Target Touches / Contacts

<b>Name</b>	<b>Valued Prospect</b>
<b>AUM</b>	<b>\$2,000,000.00</b>

#	Date	Type	Description	Notes
1	8/17/2017	Seminar	Seminar - LBI NJ	Met at Seminar. Interested in meeting.
2	8/18/2017	Phone Call	Seminar phone call follow up	Call went well. Setting up meeting for next Monday.
3	8/18/2017	Email	Seminar email follow up	Follow up email. Sent more information on Social Security (hot topic).
4	8/21/2017	Email	Weekly email	-
5	8/21/2017	Meeting	First meeting at her office	"Get to know you meeting" & homework close - set second meeting
6	8/22/2018	Phone Call	Meeting follow up call	Follow up from meeting, asking a few additional questions.
7	8/28/2017	Email	Weekly email	-
8	9/4/2017	Email	Weekly email	-
9	9/8/2017	Phone Call	Confirm meeting	Answering any questions, and confirming meeting
10	9/11/2017	Email	Weekly email	-
11	9/11/2017	Meeting	Second meeting with financial plan	Financial plan & investment planning meeting
12	9/18/2017	Email	Weekly email	-
13	9/25/2017	Email	Weekly email	-
14	9/20/2017	Phone Call	Financial plan & investment plan update	Phone call to review the updated financial plan and investment analysis
15	9/30/2017	Mailing	Q3 - Quarterly Commentary	Our quarterly investment commentary.
16	10/2/2017	Email	Weekly email	-
17	10/5/2017	Phone Call	FP & Investment Analysis #2	Follow up to review additional financial planning questions.
18	10/9/2017	Email	Weekly email	-
19	10/13/2017	Seminar	CPA & Golf Event	CPA event that we put on for local CPAs.
20	10/16/2017	Email	Weekly email	-
21	10/19/2017	Phone Call	Seminar phone call follow up	Follow up from CPA & golf event.
22	10/23/2017	Email	Weekly email	-
23	10/30/2017	Email	Weekly email	-
24	11/6/2017	Email	Weekly email	-
25	11/8/2017	Phone Call	Answer questions	Answering any questions.
26	11/13/2017	Email	Weekly email	-
27	11/16/2017	Meeting	Meeting in our office	Paperwork signed.