



Telephone Service

Number of business lines? _____

Do you have multiple locations? Yes # _____ No

Current provider: _____

Are you under contract? Yes expires? _____ No

Which feature(s) are most important to you?

How much is your monthly bill? _____

We represent the top 100 telecom carriers. We will discuss your current situation and either confirm you have a great deal already, or we will provide alternative value-add or saving solutions.



Internet / Data / TV

You currently use Data/Internet TV Both

Do you provide WiFi to your customers? Yes No

Current provider: _____

We represent all the providers. We will discuss your current situation and either confirm you have a great deal already, or we will provide alternative value-add or saving solutions.



Healthcare Medical Coverage

Do you offer health insurance to employees? Yes No

If so, do you cover their deductible or copay? Yes No

Do you see how 24/7/365 Virtual MD visits would improve employee attendance? Yes No

We offer low monthly cost medical coverage with dollar one coverage and no deductible.
ACA and ERISA compliant



Hotel Rooms or Group Events

Do you Travel for business? Yes No

Do you book group events? Yes No

What Hotel site do you use?

We provide wholesale room rate access to all business service clients. We also include event planning.



Business Capital

Could you use an influx of business capital to manage cashflow, to expand, to get volume discounts, or to get through a pinch? Yes No

Have you been in business 4+ months? Yes No

Are your sales over \$10,000/month? Yes No

Is your personal credit score at least 500? Yes No

Do you have a business bank account? Yes No

Do you have at least 4 deposits/month? Yes No

Have you had an NSF's in last 30 days? Yes No

Negative bank balance in last 30 days? Yes No

Do you have an open MCA Loan? Yes No \$ _____

Can you provide these simple documents?

3 months business bank statements? Yes No

Voided check to verify account/balance? Yes No

Valid drivers license? Yes No

We represent all the top alternative capital providers and can get you the best terms on simple and fast capital. We can get approvals as fast as 1 day and funding as fast as 3 days.



Payment Processing

Do you currently accept credit cards? Yes No

Who Is Your Provider? _____

Approximate monthly sales? _____

What % of sales do you pay in total fees? _____

How do you process cards? online mobile in-store

Do you currently have fraud insurance? Yes No

How many locations do you have? _____

Would you like to keep 100% of your sales? Yes No

We will provide you with a free quote and guarantee a savings. We also offer the option of Non-Cash Fee passthrough to customer bringing your processing fees down near zero.

Your Independent Agent

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