



LEAD NOTIFICATION

Client:

John Maxson

Appointment Date

Wednesday, March 27, 2019

Time

10:00 AM

Customer Details:

Agency Name:

Windsor Insurance Agency

Full Name

Ed Connor

Address

123 Wicker Ln., Ste. 100
Deerfield, IL, 60015
United States

Phone Number

(847) 945-5512

Time frame for potential sale:

6-12 months

Personal Lines Book Value:

\$800k+ in commissions

Commercial Lines Book Value:

\$500K+ in commissions

TYPE OF APPOINTMENT

PHONE

Notes for client:

Mr. Conner said it was lucky that we called and is open to the discussion regarding selling his book. He said he actually just spoke to his partner about potentially selling their p&c book last week, but they haven't acted yet. Unlisted and verified as not-captive. Says they do a 60% / 40% split of personal to commercial lines. Writes for all standard carriers. Asked that you call his cell phone (listed above), not the office.