

## Prospect Bio

Use this form to provide your Senior Business Partner with background information on your prospect and your relationship to him/her. You can fill this form out electronically and email it.

Date of Call \_\_\_\_\_

Appt. Time \_\_\_\_\_

Call you Senior Business Partner  
5 minutes before your appointment with  
your prospect to go over this information.

3-way  Interview

Kick-off  FUP

UFO/Distributor Name \_\_\_\_\_

Telephone No. \_\_\_\_\_

PATLive Extension \_\_\_\_\_

Prospect Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ Approx. Age \_\_\_\_\_

Family \_\_\_\_\_

Occupation \_\_\_\_\_

Recreation \_\_\_\_\_

**Connection** Please explain how you know or met this person.

**Money** Why would this person be interested in the business? Check the top 3.

- |   |   |  |   |   |
|---|---|--|---|---|
| <input type="checkbox"/> Supplemental   | <input type="checkbox"/> Financial Independence | <input type="checkbox"/> Residual Income | <input type="checkbox"/> College Fund   | <input type="checkbox"/> Retirement             |
| <input type="checkbox"/> Time Freedom   | <input type="checkbox"/> More Vacation          | <input type="checkbox"/> Career Change   | <input type="checkbox"/> Sick & Tired   | <input type="checkbox"/> Burned Out             |
| <input type="checkbox"/> Secure Freedom | <input type="checkbox"/> Be Own Boss            | <input type="checkbox"/> Work From Home  | <input type="checkbox"/> Helping Others | <input type="checkbox"/> Capitalize on Contacts |

**Positive Characteristics** Check this person's top 3.

- |  |  |   |  |  |   |
|--|--|---|--|--|---|
| <input type="checkbox"/> Business-Minded | <input type="checkbox"/> Bus. Manager  | <input type="checkbox"/> Professional   | <input type="checkbox"/> Great Salesperson | <input type="checkbox"/> Entrepreneur  | <input type="checkbox"/> Well-connected |
| <input type="checkbox"/> Hardworking     | <input type="checkbox"/> People Person | <input type="checkbox"/> Well-respected | <input type="checkbox"/> Enthusiastic      | <input type="checkbox"/> Friendly      | <input type="checkbox"/> Intelligent    |
| <input type="checkbox"/> Open-Minded     | <input type="checkbox"/> Ambitious     | <input type="checkbox"/> Outgoing       | <input type="checkbox"/> Influential       | <input type="checkbox"/> Sharp/Dynamic | <input type="checkbox"/> Fun/Good Humor |

**Present Status** What do they know about Market America? What info have they received?  
What products are they using? What meetings have they attended?

**Approach**  Direct  Evaluation  Referral

**Notes** \_\_\_\_\_