

## Telemarketer Agreement



### Retirement Prospects

### Independent Contractor Agreement - Appointment Setter

**VERY IMPORTANT: we have designed a system so that you will be successful. However, if you are not good with details, if you are not good at reading and following instructions, if you are not good at following a script, you will fail. In other words, we have 22 years of experience of what works but if you do not follow the formula, you will fail. We explain this up front because we want you to succeed and will help you succeed. Please initial that you will be a good fit for this position:**

You acknowledge that you are working as an independent contractor with Retirement Prospects.

You will be responsible for the payment of all taxes from your income, and you understand that Retirement Prospects will not be responsible for taxes and is not withholding taxes from your earnings.

Initial here

#### Agreement of ability to work and learn independently

We provide initial training on a 75-minute zoom training. We provide you a recording of that training so that you can review it. We provide you with a detailed instructions on how to excel. Those instructions are recorded videos and audios. Support for you is provided primarily by email and video and audio recordings. Therefore, our position is best for people who learn independently using self-study materials. Those needing a lot of "high-touch" interaction such as daily phone calls would not be suitable for this position. If you have problems with your computer, you understand that is your device and we do not have a way to fix it for you or train you how to use it. You need a reliable internet connection and a wired headset. We use two internet-based services. One is an auto-dialer and the other is an online calendar. We will provide training on how to use those services.

Please initial that you are a self-sufficient mature worker who is able to learn and work independently.

Initial here

#### Activity Standards



To be productive, you work hours that are most suitable for the people we call (the professionals you call generally work 9 am to 5 pm in their local time zone), but you choose your hours and work at your location. The company recommends hours between 9 am to 1 pm EASTERN TIME to set the maximum number of demonstrations (appointments). Note that you are calling professionals who work business hours in their respective time zones. Therefore, calling at night or on weekends is not productive.

This position is offered to you because you have represented that you can consistently work 4 hours per day, Monday through Friday, **CONSISTENTLY**. You understand that the company requires these hours to fill available time slots on a calendar and that any days you do not work, then the time slots go empty on the calendar and the company loses money. You agree that you can **consistently** work 4 hours per day, 5 days per week. We understand that you may need some days off. **You agree to notify us in advance of the dates when you will not be making calls. Email [bobrichards@retirementprospects.com](mailto:bobrichards@retirementprospects.com)**

Initial here

## Compensation

You will be paid \$45 per demonstration that is attended by the financial professional:

1. **ACCURATE** information entered into the online calendar
2. Advisor answers the phone when Retirement Prospects expert calls at the set time and advisor is at a PC or laptop and ready for our demonstration
3. Advisor confirms that he can afford to invest in his business and can currently accept new clients
4. Advisor confirms that he sells at least one of these products or services:
  - Life insurance (excluding final expense)
  - Annuities
  - Investment Management, Investment Sales
  - Long term care insurance
  - Financial Planning / Retirement Planning
  - Social Security Consulting
  - IRA and 401k rollovers

Retirement Prospects will send to the advisor a confirmation email immediately after you set the demonstration time and a 1-hour reminder email. We require you to call each advisor prior to their demonstration with a reminder call "Joe, this is simply a courtesy reminder that our business expert will phone you at (time) to demonstrate a method to gain new local clients."

If the advisor cancels the demonstration, asks to reschedule or does not meet the 4 criteria above, there is no compensation. If the advisor does not answer when



called, our business development expert will continue to call the advisor and if the advisor attends a demonstration at another time, you will be compensated. You will of course have the opportunity to call the advisor again and get them back onto the calendar.

Compensation payment is made every Friday by Paypal or Zelle. Payment is on Friday for demonstrations completed for the week ended Thursday at 5 pm Pacific. For example, for demonstrations completed during the one-week period from Friday, March 3 to Thursday, March 9 at 5 pm pacific, the compensation is paid on Friday, March 10.

Any documents such as your annual 1099 form, you agree to electronic delivery at the email address you provide below.

I understand and agree to the above:

Your Full Name

Your Street Address

City

State

Zip

Mobile number

Email Address

## **Below, please provide a paypal address and a zelle address.**

These are both free services so that we can pay you (paypal does not charge if you have a PERSONAL account rather than a business account). Because Paypal is not 100% reliable, please also provide a Zelle id (most banks offer Zelle as a free service with your checking account). If you do not already have a Zelle or Paypal ID to supply below, complete this form now and submit the Zelle or Paypal information later in an email to [bobrichards@retirementprospects.com](mailto:bobrichards@retirementprospects.com)

Paypal ID

Zelle ID

### Proprietary Information

Company agrees to provide to Contractor certain confidential and proprietary information. Contractor acknowledges that such confidential and proprietary



information and materials (collectively referred to as "Confidential Information"), includes, but is not limited to, information regarding the general business operations, proposals, Contractor lists, database of clients and prospects (including contact information and buying/prospecting histories), marketing strategies, financial information, plans, regardless of whether such information or materials are expressly identified as confidential or proprietary.

Contractor acknowledges that, regardless of whether such Confidential Information is prepared or generated by Contractor or Company, is provided to Contractor pursuant to this Agreement, or comes into the possession or knowledge of Contractor in some other fashion, such Confidential Information shall remain the exclusive confidential property of Company, except to the extent expressly authorized in writing by Company for dissemination. Contractor further acknowledges and agrees that all such Confidential Information constitutes trade secrets and/or valuable, proprietary information of Company as it is not generally known to the public.

During the term of this Agreement and for so long as the Confidential Information is not generally known to the public, Contractor shall not use or disclose any of such Confidential Information to any third party (except as authorized in the course of employment) without the prior written consent of Company and shall take all reasonable steps and actions necessary to maintain the confidentiality of such Confidential Information. Company database of prospects and clients is a most valuable asset and cannot be copied or used in any way except as a Contractor of Retirement Prospects. This also includes marketing and sales plans, trade secrets, procedures and methods used by Company that are not to be discussed with others.

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# Signature Certificate

Document name: Telemarketer Agreement

🔒 Unique Document ID: 0893073A07458FBF7BC83562139914598B4BE09A

LEGALLY SIGNED USING  
**WP** *esignature*  
Build. Track. Sign Contracts.

<b>Timestamp</b>	<b>Audit</b>
January 7, 2021 1:02 pm PST	Telemarketer Agreement Uploaded by Jennifer Blair - help@retirementprospects.com IP 15.204.73.228
January 7, 2021 1:20 pm PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 98.234.80.192
January 12, 2021 11:29 am PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 98.234.80.192
January 12, 2021 11:30 am PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 98.234.80.192
January 12, 2021 11:31 am PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 98.234.80.192
February 22, 2021 10:42 am PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 98.234.80.192
February 26, 2021 10:19 am PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 98.234.80.192
October 31, 2021 12:46 pm PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 98.234.80.192
October 31, 2021 12:49 pm PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 98.234.80.192
November 4, 2021 11:43 am PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 98.234.80.192
December 3, 2021 8:51 am PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 98.234.80.192
December 13, 2021 11:57 am PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 98.234.80.192
March 24, 2022 12:43 pm PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 98.234.80.192
April 8, 2022 9:45 am PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 98.234.80.192
August 23, 2022 7:50 am PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 44.205.17.79
August 23, 2022 7:54 am PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 44.205.17.79

October 21, 2022 11:19 am PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
November 4, 2022 1:43 pm PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
November 4, 2022 1:45 pm PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
November 4, 2022 1:49 pm PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
December 1, 2022 9:15 am PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
December 1, 2022 9:18 am PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
December 7, 2022 5:15 pm PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
December 8, 2022 11:39 am PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
February 9, 2023 1:29 pm PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
March 2, 2023 2:54 pm PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
March 2, 2023 2:59 pm PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
March 2, 2023 3:02 pm PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
March 10, 2023 1:46 pm PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
March 10, 2023 1:48 pm PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
March 11, 2023 3:41 pm PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
March 30, 2023 9:59 am PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
April 17, 2023 1:39 pm PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
August 4, 2023 11:47 am PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.70.99.227

September 1, 2023 6:02 pm PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.68.4
September 6, 2023 12:50 pm PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.68.4
November 8, 2023 12:03 pm PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.162.225.223
December 6, 2023 3:25 pm PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 24.7.51.6
December 6, 2023 3:29 pm PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 24.7.51.6
December 6, 2023 4:23 pm PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 24.7.51.6
January 25, 2024 12:35 pm PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 24.7.51.6
July 15, 2024 11:47 am PST	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.252.165.197



This audit trail report provides a detailed record of the online activity and events recorded for this contract.

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