Digital Marketer / Appointment Setter

RETIREMENT PROSPECTS

Retirement Prospects

Independent Contractor Agreement

Digital Marketer / Appointment Setter

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

Activity Standards

The goal is this position is to use digital marketing (e.g. ringless voice mail, texting) so that prospects contact you. You then screen them and those that qualify, you add to our company appointment calendar.

This position is offered to you because you represent that you have experience with mass texting and appointment setting.

You understand that the time commitment for this position is 15-20 hours/week but the responses to the ringless voice mail and text messages will be sporadic through the week. You represent that you are able to respond to those responses in a timely manner during business hours.

Initial here

Retirement Prospects provides a script for qualifying candidates, a 60-minute training session on Zoom, and answers to frequent concerns. We have also accumulated a knowledgebase with every question that appointment setters have asked and have recorded those answers for you at https://setters.freshdesk.com.

Consistency is very important. We need to fill our appointment calendar every week. We understand that some days you may not be able to respond to calls or texts but can make that time up another day that week. You agree to notify Retirement Prospects 2 weeks in advance if you will be absent for an entire week or more.

Initial here that you understand and agree

Compensation

You will be paid $45 per set and attended the demonstration:

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/or 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

Paypal ID Paypal ID

Zelle 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.

X _______________________

Signature Certificate

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LEGALLY SIGNED USING WPesignature
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December 19, 2023 1:50 pm PDT	Digital Marketer / Appointment Setter Uploaded by Jennifer Blair - help@seniorleads.com IP 73.252.165.197

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