

Potential Representative Worksheet

Date: _____

Name: _____

Address: _____

E-mail Address: _____

Phone #: _____

How Referred: _____

Supervisor: Self Other: _____

Licenses Held: _____

Professional Designations: _____

Position: Registered Representative OSJ Manager # of RR's supervised: _____

Prior Year's Production Level: _____

Current Production Level: _____

Projected Gross Production Level: _____

Payout: _____ %

Major Product Types Sold: _____

Types of financial services offered: _____

Additional Comments: _____
