

Brokerage  
**OAKTREE** "National Lead System"

See More Prospects And Increase Your Sales



**Are you making  
\$6,000 Per Month???**  
**Some of our agents are... and so can you!!!**

A good number of our agents are making **GREAT SALES** in their Annuity markets. Using our client mailed lead generation system, agents can maximize their time by **SELLING**, not prospecting.

**SOME SAMPLE NUMBERS:**

1000 Mailings @ 2.0% Return = 20 Leads  
20 Leads = Approx. 10 Appointments

**10 Appointments = Approx. 6 Sales = \$150,000 in Annuity Premium @4.00% Commission = \$6,000**

1000 Mailings @2.5% Return = 25 leads  
25 Leads = Approx. 12 Appointments

**12 Appointments = Approx. 7 Sales = \$175,000 in Annuity Premium @4.00% Commission = \$7,000**

- Stop Paying Too Much For Leads (\$415 Per 1000 Mailers )
- Get High Quality Leads Consistently (2.0% to 2.5% Return Currently)
- Earn Top Commissions (Not those reduced commissions for lead contracts)
- Do Business with Top Carriers that Issue Your Business - "Fast!"
- Receive the 1000 person mailing list with names, addresses, and phone numbers (For \$25.00 More the complete 1000 names will be mailed to you on a disk)

**Need more details??!!  
GIVE US A CALL!!!**

Brokerage  
**OAKTREE** Call Today!  
**888-591-1341**  
www.oaktreeus.com

# The Annuity Lead Program From

# Brokerage OAKTREE

## HOW IT WORKS:

1. Print this page and fill out the form below with:  
The zip codes you want mailed (we suggest picking atleast 4)  
The ages of their potential clients (we suggest ages 55 and above)  
The household incomes per home mailed (we suggest \$60,000 and up)
2. Mail this form and a check made out to Lead Strategies for \$415 (per 1000) to:  
(For \$25.00 More the complete 1000 names will be mailed to you on a disk)  
OAKTREE Brokerage  
505 Carter Street  
Bristol, VA 24201
3. Then you will receive the leads - They will be mailed directly back to your from  
Lead Strategies.

**CALL TODAY IF YOU HAVE ANY QUESTIONS**  
**(888) 591-1341**

### Annuity Lead Order Form:

Agent Name and Address: \_\_\_\_\_  
\_\_\_\_\_

Number Of Annuity Leads Ordered (Cost \$415 per 1000 or For \$25.00 More the complete 1000 names will be mailed to you on a disk) \_\_\_\_\_  
\_\_\_\_\_

Zip Codes Requested (Please pick at least 4): \_\_\_\_\_  
\_\_\_\_\_

Household Incomes Requested (We suggest \$60,000 and up): \_\_\_\_\_  
\_\_\_\_\_

Household Ages Requested (We suggest 55 and up): \_\_\_\_\_  
\_\_\_\_\_

# LEAD \$TRATEGIES\$

## ANNUITY LEAD MAILERS

Suggested Demographic: Age 55-80, Income: 50K+. Homeowner

Bob Weir  
P 877-589-9866  
P 631-369-0584  
leads9866@aol.com  
P.O. Box 966  
Riverhead, NY 11901

### IMPORTANT NOTICE FOR MATURE AMERICANS

There are new programs to lower your income taxes, increase your net income, exempt some of your income from being counted toward your social security tax, and to help you pass down more to your heirs.

No one will notify you of your eligibility for these programs, you must take action!

To learn more, complete and mail this postage paid card today!

I'm interested in learning more about:

- Lowering my income taxes    Lowering my taxes on social security    Increasing my income  
 Passing my IRA/K to my heirs tax free, without effecting my withdrawals    Passing down to my heirs  
 Recovering from market losses   Name: \_\_\_\_\_  
 All of the above   Phone: (\_\_\_\_) \_\_\_\_\_

Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

Spouse's: \_\_\_\_/\_\_\_\_/\_\_\_\_

Not affiliated with any government agency.

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**\*We  
use  
this  
form\***

### 2007 IMPORTANT ELDER LAW CHARGES

CONGRESS PASSED NEW LEGISLATION THAT STANDARDIZES ENTITLEMENT PROVISIONS FOR SENIORS AND RETIREES. THESE CHANGES PROVIDE SENIORS THE FOLLOWING TAX BENEFITS

Please check off your area of interest in any or all of the 5 boxes listed

Our information is FREE to persons age 50 & over.

- Reduce or eliminate taxes on **Social Security & Interest Income**  
 Earn **Double or Triple Interest on CD's** with no risk to principal balance  
 Pass your **IRA/401K** to your spouse, children, and grandchildren so that it can maintain it's **Tax-Deferred status** for multiple generations.  
 Protection from **Stock Market Loss** due to market volatility on your principal and interest.  
 Elimination of **Probate Fees & Federal Estate Taxes**

AS A U.S. CITIZEN AGE 60 AND OVER, YOU MAY NOW LEARN HOW TO QUALIFY WITHOUT ANY COST UNDER FEDERAL, AND STATE LAW

REQUEST FOR INFORMATION

Signature \_\_\_\_\_ Age \_\_\_\_\_

Signature \_\_\_\_\_ Age \_\_\_\_\_

Phone Number (ensures proper routing) \_\_\_\_\_

Not affiliated with or endorsed by any government agency.

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### SPECIAL BULLETIN REGARDING RECENT TAX LAWS PASSED BY CONGRESS

Under recent tax legislation, many senior citizens now qualify for a program that allows them to stop paying taxes to Uncle Sam on interest income by diverting that money into an insured tax-free or tax deferred account for themselves and their heirs. Most senior citizens can qualify for this TAX SAVINGS program and do not even know it! The government will not notify you for your eligibility. It is up to you to find out for yourself! IMPORTANT: If you have CD's, Money Market Funds, Savings Accounts, Bonds, etc. and would like to know if you qualify for improved interest rates with tax benefits, send this **postage paid** card back today! You still may qualify for these programs if you act now!

Name: \_\_\_\_\_

Phone: (\_\_\_\_) \_\_\_\_\_

Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

Spouse's: \_\_\_\_/\_\_\_\_/\_\_\_\_

Not affiliated with any government agency.

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