

**DM Profile  
Initial Agreement Profile**

**1. DM Information (complete a form for each location)**

Name \_\_\_\_\_ Federal Tax # \_\_\_\_\_  
Street Address \_\_\_\_\_ Phone (\_\_\_\_) \_\_\_\_\_  
Mailing Address \_\_\_\_\_ Fax # (\_\_\_\_) \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Web Site: \_\_\_\_\_ E-Mail Address: \_\_\_\_\_

**2. DM Management**

President \_\_\_\_\_ Ph: (\_\_\_\_) \_\_\_\_\_ x \_\_\_\_\_ E-Mail: \_\_\_\_\_  
Gen. Mgr. \_\_\_\_\_ Ph: (\_\_\_\_) \_\_\_\_\_ x \_\_\_\_\_ E-Mail: \_\_\_\_\_  
Sales Mgr. \_\_\_\_\_ Ph: (\_\_\_\_) \_\_\_\_\_ x \_\_\_\_\_ E-Mail: \_\_\_\_\_  
Service Mgr. \_\_\_\_\_ Ph: (\_\_\_\_) \_\_\_\_\_ x \_\_\_\_\_ E-Mail: \_\_\_\_\_  
Acctg Mgr. \_\_\_\_\_ Ph: (\_\_\_\_) \_\_\_\_\_ x \_\_\_\_\_ E-Mail: \_\_\_\_\_

People who have authority to make decisions: \_\_\_\_\_

**3. DM Owners (all with ownership greater than 5% of any company that will participate directly or indirectly in the Agreement)**

Owner #1: \_\_\_\_\_ Capacity: \_\_\_\_\_ Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_  
Home Address: \_\_\_\_\_  
Yrs. At Residence: \_\_\_\_\_ SS # \_\_\_\_ - \_\_\_\_ - \_\_\_\_  
Owner #2: \_\_\_\_\_ Capacity: \_\_\_\_\_ Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_  
Home Address: \_\_\_\_\_  
Yrs. At Residence: \_\_\_\_\_ SS # \_\_\_\_ - \_\_\_\_ - \_\_\_\_  
Owner #3: \_\_\_\_\_ Capacity: \_\_\_\_\_ Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_  
Home Address: \_\_\_\_\_  
Yrs. At Residence: \_\_\_\_\_ SS # \_\_\_\_ - \_\_\_\_ - \_\_\_\_

Please answer and explain any "Yes" answers.

Have any Owner(s)/ Principles ever filed personal or business bankruptcy? \_\_\_\_\_  
Do you have and are you using call recording hardware integrated in your phone system? \_\_\_\_\_  
Are you recording all sales calls? \_\_\_\_\_  
Are any of the owners(s) or the business currently under litigation, investigations or subpoena? \_\_\_\_\_  
Have any of the Owner(s) been convicted of a crime (not traffic citations)? \_\_\_\_\_  
Has any owner been involved in a judgment against or settlement agreement? \_\_\_\_\_

**If any of the above answers are "Yes", please attach on a separate sheet of paper, a detailed explanation of the situation and the ultimate outcome.**

**5. Production: Average Monthly VSC Sales: \_\_\_\_\_**

**6. Approximate Sales by Lead Sources (last 6 months):**

a. **Mail:** \_\_\_\_\_ %  
b. **Predictive Dial:** \_\_\_\_\_ % - **Internal:** \_\_\_\_\_ %      **Third Party Sources:** \_\_\_\_\_ %  
c. **Internet Leads:** \_\_\_\_\_ % - **Internal:** \_\_\_\_\_ %      **Third Party Sources:** \_\_\_\_\_ %  
d. **Other:** \_\_\_\_\_ % - **Describe:** \_\_\_\_\_  
e. **Other:** \_\_\_\_\_ % - **Describe:** \_\_\_\_\_

**7. FULLFILLMENT: Forte Data \_\_\_\_\_ Moxy Solutions \_\_\_\_\_ Other \_\_\_\_\_**