



# Live Transfer Lead Agreement

Business Name: \_\_\_\_\_ Phone: \_\_\_\_\_  
Name: \_\_\_\_\_ Email: \_\_\_\_\_

**PRICING ARRANGEMENT:**

QTY: \_\_\_\_\_ UNIT PRICE: \$25 TOTAL PRICE: \_\_\_\_\_ INITIALS: \_\_\_\_\_

Client will receive the # of leads purchased in the QTY section. **25% of leads can be returned if not the owner, not interested, disconnected/dropped, less than 500 FICO, less than 6 mo in business.**

**PAYMENT DETAILS:**

Credit Card # \_\_\_\_\_ Exp \_\_\_\_\_  
Name on Card \_\_\_\_\_ CID: \_\_\_\_\_  
Billing Address \_\_\_\_\_

**LEAD DELIVERY DETAILS:**

EMAIL(s) to use for SENDING LEADS: \_\_\_\_\_  
What date would you like to start receiving leads? \_\_\_\_\_  
What is the maximum number of leads would you like to get per day? \_\_\_\_\_  
What is the transfer phone number that you want to receive the calls? \_\_\_\_\_  
When will you be available for transfers? (Open M-F 7am - 5pm PST) \_\_\_\_\_

**TERMS AND CONDITIONS:**

- 1) **Contracted Parties:** This contract is between Synergy Direct Solution, LLC and the individual/company listed above.
- 2) **Lead Description:** Live Transfer Leads begin with Synergy's internal marketing efforts that include but are not limited to internet leads, email marketing, direct mail, TV & radio, click funnel marketing, social media marketing, UCC leads, and aged MCA leads. Live Transfers are connected directly to the client. Synergy can in no way guarantee commission, sales, success, etc.
- 3) **Real Time Leads contain the following: however aged leads may not include all information:**  
Company name, contact name, business phone, cell phone, fax number, contact email, requested amount, why they want the funds, have they had issues getting approved in the last 30 days (yes or no), do they accept credit cards (yes or no), what do they think their credit score is right now, do they have any equity, if they have equity are they at least 50% paid down, how many loans do they have out now, what are the balances of the loans they have now, are they the owner or decision maker, how long have they owned the business, do they need the money right away, do they deposit at least \$15,000 in their business bank account and what is the best time for a call back from the lender or broker. All fields may not be made available by the borrowers and all fields may not be included with the lead as a result.
- 4) **Limited Liability:** Client agrees to limit any and all liability, claim for damages, error, omission, negligence, cost of defense, claim for loss of business, consequential damages, or expenses levied against client on account of any design, error, omission, negligence, defect, failure to maintain service, or any other claim he or she may have against Synergy Direct Solution LLC in a sum not to exceed the contracted price herein.
- 5) **Arbitration of Disputes:** Any controversy or claim relating to or arising out of this agreement shall be settled in San Diego County California.
- 6) **Refunds:** No refunds will be provided once the order has been processed.
- 7) **Chargebacks:** In the event of a chargeback the client agrees to an additional chargeback fee of \$500. Synergy Direct Solution LLC will address any and all concerns the client has via email and will offer a fair and reasonable solution so a chargeback is not necessary.
- 8) **Exclusivity:** Live Transfers are exclusive to the client for 30 days.

I understand and accept the terms of this agreement:

X \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_