



Semi Exclusive Appointment Leads Agreement

Business Name: _____ Phone: (____) ____ - _____
Name: _____ Email: _____

PRICING ARRANGEMENT:

QTY: _____ UNIT PRICE: \$15 TOTAL PRICE: \$ _____ INITIALS: _____

APPOINTMENT LEADS - Clients will receive the number of leads purchased in the QUANTITY section.

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? _____
Other Delivery Notes: _____

TERMS AND CONDITIONS:

- 1) **Contracted Parties:** This contract is between Synergy Direct Solution, LLC and the individual/company listed above.
- 2) **Lead Description:** Real Time 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. Real Time Leads are verified over the phone and reviewed by Quality Assurance prior to the lead being sent via email. The borrower should receive an email reminder regarding the phone appointment from the lender or broker.
- 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. Synergy Direct Solution cannot in any way guarantee a close rate, success ratio, or commissions from sales.
- 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.

I understand and accept the terms of this agreement:

X _____ Date: ____ / ____ / ____