

# Money Lead\$

## APPLICATION PROCESS

Optional:

Attend up to two additional meetings  
While completing the application forms \$20.00 meeting fee

Submit completed forms:

Application,  
Plus 3 letters/emails of recommendation  
With your check \$165.00  
(\$70.00 initiation fee, \$25.00 Photos Fee and \$70.00 first month's dues)

The package will be presented to the board of directors for review and approval at their next regular board meeting.

You will be advised of their decision by letter or phone (probably both).

Bring a supply of your business cards to your first regular meeting with us:

Enough to distribute among members (35) and  
Supplies for the Money Lead\$ member card file (30 +/-)

Attendance requirements are 2 out of 4 meetings a month.

Should it ever become necessary, you may request a leave of absence in advance by submitting a brief written request to the board of directors.

The Country Club dress code does not allow denim clothing  
or use of cell on the property

Parking is in the first lower parking lot.

We look forward to you becoming a member of Money Lead\$!

*\*While Money Lead\$ respects the individual dietary needs of its membership, we are unable to accommodate special menus under our current food service contract with the Pedalers Fork.*



MEMBERSHIP APPLICATION FORM

QUESTIONS ABOUT YOU:

Your Name: \_\_\_\_\_ Birth Date: \_\_\_\_\_ Mo/Dy

Home Address: \_\_\_\_\_  
Street Unit #

City/State Zip  
Home Telephone: (\_\_\_\_) \_\_\_\_\_ Spouse's Name: \_\_\_\_\_  
Optional

QUESTIONS ABOUT YOUR BUSINESS:

Nature of your Business: \_\_\_\_\_

Your Business Name: \_\_\_\_\_

Your Business Address: \_\_\_\_\_  
Street Unit #  
City/State Zip

Your Business Phone: (\_\_\_\_) \_\_\_\_\_ Your Cell Number: (\_\_\_\_) \_\_\_\_\_

Your Pager: (\_\_\_\_) \_\_\_\_\_ Your E-mail address: \_\_\_\_\_

Years Experience in Your Business: \_\_\_\_\_ Degree(s): \_\_\_\_\_

License Numbers/ Required Insurance(s): \_\_\_\_\_

Memberships in other Civic, Business, Social and Professional Groups: \_\_\_\_\_

\_\_\_\_\_  
(Please use back of this form if you need more space)

PLEASE DESIGNATE THE MONEY LEADS MEMBER WHO SPONSORED YOUR APPLICATION:

\_\_\_\_\_

NAME THREE REFERENCES, AND ATTACH CORRESPONDING LETTERS: **Money Leads members excluded.**

\_\_\_\_\_  
\_\_\_\_\_

**I hereby make application for membership in MONEY LEAD\$. I am not a member of any other leads referral group(s) and agree, if accepted, to abide by all the terms of the Bylaws and Rules of the Organization.**

\_\_\_\_\_  
Applicant Signature

\_\_\_\_\_  
Date



## WEBSITE INFORMATION SHEET

The following information will be submitted for use on the Money Leads website and business directory. Please enter all fields **EXACTLY** as you would like your listing to appear.

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

Company Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Cell Number \_\_\_\_\_

E Mail Address: \_\_\_\_\_

Web Site URL \_\_\_\_\_

Years in business \_\_\_\_\_

Your Name and Title: \_\_\_\_\_

Field Profession \_\_\_\_\_

Company Description and Services: (35 words or less)

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Please E Mail to: [pbxwh1@gmail.com](mailto:pbxwh1@gmail.com)

Any questions concerning this form please see or call the Money Lead\$ Administrator Liz Hotz at (818) 448-0818



## LEADS DEFINITIONS

1. **"THE SLAM DUNK"**---This is the lead where a business transaction is actually facilitated by a Premier member with "hands-on" assistance. For example, you have a client that needs services and the client places an order or retains a member on your direction. You set the transaction in motion and facilitate its finalization.
2. **"THE GENERAL"**---This is the lead that opens up a general opportunity for a Premier member. For example, you know someone that can produce leads for a member or members such as the chairperson of a large organization. You give the person cards of members, invite the person to a breakfast, or give him or her promotional material.
3. **"THE SHANGHAI"**---This is the lead where you are in the presence of a client or customer that needs goods or services provided by another member. For example, a prospect is sitting in your office and announces that he or she needs the service of another member. You pick up the telephone and make a direct introduction.
4. **"THE PREMIER"**---This is the lead classification that covers services that you or your company need. For example, you need printing services for your business. You place an order directly with another member.
5. **"THE PROMOTIONAL"**---This is the lead classification where you do some public relations for individual members or for the Premier organization. You suggest that when and if the prospect needs the service of a particular Premier member, that he or she call the member. For example, a friend of yours says that they will be planning a vacation this year. You suggest that the Premier Travel Agent is the best in the business and give the client the member's card, or name and telephone number. You have planted the seed that may grow into a business relationship. Or, you give a prospect a promotional flier listing Premier members and ask them to use the services of members when necessary.
6. **"THE RICOCHET"**---This is a lead that is an "out-growth of a lead to you or another Money Leads member. For example, you refer a personal injury case to Franklin and he then refers the client to Rollie, Martha, and or Joe.
7. **"THE OUTSIDER"**---This is a lead that brings "new business" to Money Leads members consisting of new clients and business that is not between members.
8. **"THE GRAND SLAMMER"**---This is the truly great lead of leads, one that may provide great opportunity and fortune to a member. A printing lead to Lee for a large organization or a water services lead to Vance for a large consumer are good examples. Or perhaps a real estate developer who needs many large loans for Peaches & Tom and the services of Steve, Tom, Jim and/or Dave.

*Revised January 6, 2014*