

**Find Existing Policies and Customers**

Name:   
 Policy Number:   
 Home Phone:   
 Company:   
 Client Address:   
 File Number:

Find all Clients entered between these Dates: 11/ 7/2009 and 12/ 7/2009

Type: All  
 Sort by: Policy Type  
 Group Results  
 Location: All

Active  Cancelled  Expired  Quote  Prospect  All

Eff Date	Exp Date	Client Name	Type	Co. Name	Agent	Policy #	Status	File Number	Phone#
<b>AD&amp;D</b>									
08/12/07	08/12/08	William R Braden	AD&D	Allstate County Mutual	Zippy John	BTA0019769695	Expired	W0004	(209)823-3243
08/25/09	02/25/10	a d policy	AD&D	Aaffordable Ins	Zippy Daddy		Active		
09/11/09	03/11/10	new policy	AD&D	21st Century - Aig Specialty Company	Agent		Active		
10/15/09	04/15/10	Homer Simpson	AD&D	Liberty County Mutual	John	321654987	Active	1234	(666) 666-6666
10/02/09	10/02/10	another test	AD&D	Mga Test	Tara Stipp	6566544	Cancelled		(555) 555-5555
11/01/09	11/09/10	Homer Zippy Simpson	AD&D	Grinnell Select	Melanie	321654988	Active		(555) 555-5555
10/20/09	04/20/10	test	AD&D	Allstate County Mutual	Tara Stipp		Active		
10/26/09	04/26/10	LCSINC	AD&D	Grinnell Mutual	Dana		Quote	L0001	(235) 778-7777
10/27/09	04/27/10	test	AD&D		Tara Stipp		Active		
<b>Annuity</b>									
10/02/09	11/17/10	annuity test	Annuity	21st Century - Aig Specialty Company	Agent		Active		(666) 666-6666
08/27/09	02/27/10	J R Hoge	Annuity	Test Company	John		Quote		(972) 555-1212
07/06/09	01/06/10	Test	Annuity	No Company Selected	No Agent Selected		Active	T0084	
<b>Auto</b>									
07/15/09	08/14/09	Test Quote	Auto				Prospect	G0001	
07/16/09	01/16/10	Agent Question	Auto	Direct Debit	Dawna		Cancelled	G0002	
06/25/09	12/25/09	test case	Auto	21st Century - Aig Specialty Company	Agent		Active	C0040	
06/29/09	12/29/09	Delete Check	Auto	21st Century - Aig Specialty Company	Agent		Active	0002	
07/01/09	01/01/10	Add Client	Auto	Aaffordable Ins	Agent		Renewal	0002	
07/01/09	01/01/10	New Customer	Auto	Aaffordable Ins	Agent		Active	0002	
07/02/09	01/02/10	Policy Balance	Auto	Allstate Floridian Indemnity	Dawna		Active	0002	
07/07/09	01/07/10	Commission Test	Auto	Safeco	Dawna		Active	T0082	
09/22/08	03/22/09	Phil Piche	Auto			4756682600	Expired		
09/23/08	03/23/09	Vida J Farr	Auto			4756990500	Expired		
08/26/08	02/26/09	James Brown	Auto	Grinne		DA 2472486	Expired		

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