

Client Lead & Appointment Purchase Agreement

Office Allies

This Client Lead & Appointment Purchase Agreement (“Agreement”) is entered into between **Office Allies** (“Company”) and the purchasing client (“Client”).

By purchasing leads from Office Allies, the Client agrees to the terms and conditions outlined in this Agreement.

1. Services Provided

Office Allies provides **exclusive life insurance appointment leads generated through outbound telemarketing campaigns**.

Each appointment lead includes:

- Prospect contact information
- Qualification confirmation
- Recorded qualification call
- Scheduled callback time with a licensed insurance specialist

All leads delivered are **exclusive to the purchasing client** and are not resold to other buyers.

2. Nature of Appointment Leads

Office Allies schedules appointment opportunities with interested prospects. However, **attendance or availability of the consumer at the scheduled call time cannot be guaranteed**.

Office Allies provides qualified prospects but **does not guarantee policy sales, appointments kept, or revenue generated** from the leads.

3. Client Responsibilities

The Client agrees to:

- Ensure all agents contacting leads are **properly licensed** where required
- Comply with all applicable **federal and state laws** related to telemarketing and insurance marketing
- Use the leads solely for legitimate insurance marketing purposes
- Maintain professional and compliant communication with consumers

Office Allies is not responsible for how the Client or their agents conduct follow-up calls.

4. Payment Terms

All lead purchases must be **paid in advance** unless otherwise agreed in writing.

Payments are typically processed through **Stripe**.

Clients choosing to pay via **bank wire transfer** may request that Stripe processing fees be waived.

Lead generation will begin once **payment confirmation has been received**.

5. Lead Delivery

Leads are delivered electronically through the **client portal or an approved delivery method**.

Delivery speed may vary depending on:

- geographic targeting
- demographic targeting
- campaign conditions

Office Allies does **not guarantee a specific delivery timeframe** unless agreed in writing.

6. Credit Requests

All credit requests are governed by the **Office Allies Lead Credit Policy – 2026**.

Credits, when approved, will be **applied to the client account for future lead purchases** and will **not be issued as cash refunds**.

7. Limitation of Liability

Office Allies' responsibility is limited to providing leads that meet the qualification criteria confirmed during the recorded call.

Office Allies shall not be liable for any indirect, incidental, or consequential damages resulting from the use of the leads.

8. Policy Acceptance

By purchasing leads from Office Allies, the Client acknowledges and agrees to the following policies:

- Lead Credit Policy – 2026
- Lead Fulfillment Policy – 2026

These policies form part of this Agreement.

9. Policy Updates

Office Allies reserves the right to update or modify its policies when necessary.

Any updates will apply to **future lead orders**.

10. Agreement Acceptance

By signing below, the Client confirms that they have read and agree to the terms outlined in this Agreement.

CLIENT INFORMATION

Company Name: _____

Authorized Representative: _____

Title: _____

Email: _____

Signature: _____

Date: _____

OFFICE ALLIES

Authorized Representative: _____

Title: _____

Signature: _____

Date: _____