Reports\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

End of Month Checklist on New Accounts- *Send to Management:*

1.  \_\_ Prospective owner Referral Call Ledger

2.  \_\_   New Account Ledger

3.  \_\_   Referral Calls Worksheet

4.  \_\_   Sales Report (weekly)

5.  \_\_   Fill out Referral Fees form (Take from new accounts ledger)