Daily report · 08/24/2026

Dana Whitfield — 20 policies in management · 7 need your support

YOUR BOOK BY CARRIER

	CURRENT	IN PROCESS	ACTION	TOTAL
Mutual of Omaha	2	1	1	4
F&G	2	-	2	4
Americo	2	1	1	4
Transamerica	1	1	1	3
Ethos	1	1	1	3
Corebridge	1	-	1	2

WEEK IN REVIEW

From 08/24 to 08/28

Commissions	Chargebacks	Net for the week	Policies needing support
$6,053.15	-$486.20	$5,566.95	7
6	1		

BY AGENT

	Commissions	Chargebacks	TOTAL
Direct	$2,552.40	-$486.20	$2,066.20
Alicia Fontaine	$1,800.30	-	$1,800.30
Marcus Reed	$1,700.45	-	$1,700.45

COMMISSIONS TODAY

Vivienne Ashcroft Transamerica	$1,102.40
Marguerite Thorne Ethos · Alicia Fontaine	$515.80
TOTAL	$1,618.20

NEED YOUR SUPPORT (7) · tap the number to call

Denise Hartley F&G · LX551140 **Marcus Reed**	past due, $312.60	(407) 555-0142
Robert Callahan Mutual of Omaha · MO7741002	past due, $148.20	(305) 555-0118
Anthony Braswell Americo · AM03551907	behind on payment	(619) 555-0173

Priscilla Vaughn Transamerica · 6602551188 **Marcus Reed**		needs client signature	(813) 555-0164
Gregory Lindstrom Corebridge · 6260551473		medical records pending	(904) 555-0135
Yolanda Prescott Ethos · PT08551960 **Alicia Fontaine**		needs client signature	(702) 555-0129
Marcus Delacroix F&G · LX551702		incomplete application	(214) 555-0187

DETAIL BY CARRIER

F&G — 4

BEHIND ON PAYMENT 1

Denise Hartley Marcus Reed	LX551140	past due, $312.60	(407) 555-0142

INCOMPLETE APPLICATION 1

Marcus Delacroix	LX551702	incomplete application	(214) 555-0187

ACTIVE 1

Bernadette Osgood Marcus Reed		LX552018	(971) 555-0143

IN FORCE 1

Horace Pemberton		LX552390	(503) 555-0178

Mutual of Omaha — 4

BEHIND ON PAYMENT 1

Robert Callahan	MO7741002	past due, $148.20	(305) 555-0118

UNDER CARRIER REVIEW 1

Constance Whitmore	MO7741885	under carrier review	(480) 555-0151

ACTIVE 2

Clifford Ravenscroft		MO7742119	(602) 555-0188
Lorenzo Castellano Marcus Reed		MO7742558	(949) 555-0190

Americo — 4

BEHIND ON PAYMENT 1

Anthony Braswell	AM03551907	behind on payment	(619) 555-0173

UNDER CARRIER REVIEW 1

Terrance Bouchard Alicia Fontaine	AM03552210	under carrier review	(678) 555-0196

ACTIVE 1

Imogen Fairbanks Marcus Reed		AM03552477	(858) 555-0166

IN FORCE 1

Cordelia Winslow		AM03552904	(239) 555-0137

Transamerica 3

PENDING REQUIREMENTS 1

Priscilla Vaughn Marcus Reed	6602551188	needs client signature	(813) 555-0164

AWAITING DRAFT 1

Rosalind Kettering Alicia Fontaine	6602552041	awaiting draft	(562) 555-0107

ACTIVE 1

Vivienne Ashcroft		6602552863	(614) 555-0122

Ethos 3

ISSUED, MISSING REQUIREMENT 1

Yolanda Prescott Alicia Fontaine	PT08551960	needs client signature	(702) 555-0129

POLICY CHANGE IN PROCESS 1

Desmond Ellsworth	PT08552334	change in process	(321) 555-0172

IN FORCE 1

Marguerite Thorne Alicia Fontaine		PT08552745	(720) 555-0111

Corebridge 2

PENDING REQUIREMENTS 1

Gregory Lindstrom	6260551473	medical records pending	(904) 555-0135

IN FORCE 1

Sylvester Grimaldi Alicia Fontaine		6260552690	(347) 555-0154

0 closed policies are not listed. Numbers are tappable from your phone.