

## Form For AD Approval

DATE: \_\_\_\_\_ AGENT NAME: \_\_\_\_\_ FORM ID: \_\_\_\_\_

CAMPAIGN NAME: \_\_\_\_\_

DATABASE NAME: \_\_\_\_\_ AD ACCOUNT NAME: \_\_\_\_\_

CONNECTED?  YES  NO AD ACCOUNT #: \_\_\_\_\_

**Awareness:**

- Brand Awareness
- Reach

**Consideration:**

- Traffic
- Engagement
- App Installs
- Video Views
- Lead Generation
- Messages

**Conversion:**

- Conversions
- Catalog Sales
- Store Traffic

**Channel:**

- FB  IG  TW
- LI  YT  PT  SC

**Line Of Business:**

- ACA  MA
- FE  LI  ANN
- FP  CE  RC
- CB  EC  TR
- CT  PS

**Carrier:**

- Aetna  AIG  Allianz
- AMB  Assurity  BCBS
- Cigna  CHC  Devoted
- Humana  IMG  Molina
- National Gen  Oscar
- UHC  UHO  WellCare

**Month/Year:**

\_\_\_\_\_, \_\_\_\_\_

**Language:**

\_\_\_\_\_

Campaign Name: \_\_\_\_\_

**Campaign Budget:**

- Daily Budget
- Lifetime Budget

Amount \$ \_\_\_\_\_

**Landing Page:**

- Health Insurance Resource Center (HIRC)
- Final Expense For All (FEFA)
- Medicare Para Usted (MPU)
- The Medicare Resource Center (TMRC)
- The American Institute of Financial Education (AINFE)
- Wealth Management Solutions (WMS)
- Other: \_\_\_\_\_
- Su Cuidado De Salud (SCDS)
- Gastos Finales Para Usted (GFPU)
- Premier Insurance Contracts (PIC)
- Cashback Universe (CU)
- The Annuity Service Center (TASC)

**Target Audience:**

Locations: \_\_\_\_\_

Age: \_\_\_\_\_, \_\_\_\_\_ Gender:  Male  Female Language: \_\_\_\_\_

Audience Name: \_\_\_\_\_

**Schedule:**

Run Continuous  Set Start/End Date Start: \_\_\_\_\_ End: \_\_\_\_\_

**AD SET NAME:**

**Channel:**  
 FB  IG  TW  
 LI  YT  PT  SC

**Line of Business:**  
 ACA  MA  CB  CT  
 FE  LI  ANN  EC  
 FP  CE  RC  TR  PS

**Landing Page:**  
 HIRC  SCDS  
 FEFA  GFPU  
 MPU  PIC  AINFE  
 TMRC  WMS  TASC  
 OTHER: \_\_\_\_\_

**# of ADs:** \_\_\_\_\_

\*Add agents initials at the end of landing page if other is chosen.

**AD SET NAME:** \_\_\_\_\_

**AD Name:**

**Line Of Business:**  
 ACA  MA  FE  
 LI  ANN  FP  
 CE  RC  CB  
 EC  TR  CT  
 PS

**Landing Page:**  
 HIRC  SCDS  
 FEFA  GFPU  
 MPU  PIC  
 TMRC  WMS  
 AINFE  TASC  
 OTHER: \_\_\_\_\_

\*Add agents initials at the end of landing page if other is chosen.

**AD #:** \_\_\_\_\_ of \_\_\_\_\_

**Descriptor:**  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**AD Name:** \_\_\_\_\_

**Media:**  Image  Video  Carousel

**AD Text:** \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Call To Action Button:**  Apply Now  Book Now  Download  Get Offer  Get Quote  Learn More  Sign Up  Subscribe

**Website URL:** \_\_\_\_\_

**Lead Form:**  Short  Long **Lead Form Name:** \_\_\_\_\_

**Short Form Questions**

**Contact Fields:**  Email  Phone #  Address  City  State  Zip Code

**User Information:**  Full Name  First Name  Last Name

**Demographic Questions:**  DOB  Gender  Marital Status  Military Status

**Work Information:**  Job Title  Work #  Work Email  Company Name

## LEAD FORM WORKSHEET

- Form Type**
- More Volume**  
(use a form that's quick to fill out and submit on a mobile device)
  - Higher Intent**  
(add a review step that gives people a chance to confirm their info)
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**Headline:** \_\_\_\_\_

**Layout:**  Paragraph  Bullets

**Intro**

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**Contact Fields:**  Email  Phone #  Address  City  State  Zip Code

**User Information:**  Full Name  First Name  Last Name

**Questions** **Demographic Questions:**  DOB  Gender  Marital Status  Military Status

**Work Information:**  Job Title  Work #  Work Email  Company Name

**Privacy Policy**

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**Thank You  
Screen**

**Headline:** \_\_\_\_\_

**Description:** \_\_\_\_\_

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**Button Type:**  View Website  Download  Call Business

**Button Text:** \_\_\_\_\_

**Button Link/Phone Number:** \_\_\_\_\_