MONTHLY FINANCIAL LEAD ASSESSMENT

Financial Leads

Financial Lead Creation

ISSUE	LEAD MONTH 00
CADENCE	MONTHLY
HANDLING	CLIENT CONFIDENTIAL

BOTTOM LINE UP FRONT

UCC filings this month surfaced 1,240 new equipment and receivables liens in the client's target states. After scoring against financial and activity data, 86 leads met the high-value threshold. Responsiveness was strongest among logistics firms with recent fleet financing.

1.2K
NEW UCC FILINGS REVIEWED

86
HIGH-VALUE LEADS SCORED

24%
ASSESSED RESPONSE RATE

LEAD PIPELINE STRENGTH

4 / 5

HIGH

LOW — CRITICAL

Scored on TAM-C's 1 to 5 scale. Up from the prior month on stronger logistics filings.

01 Lead highlights

UCC FILINGS — HIGH

Fleet financing wave in Texas

Thirty-one logistics firms in Texas filed new equipment liens this month, many with a single lender, [redacted]. Lien sizes suggest fleet expansion and openness to additional financing products.

SOURCE · STATE UCC RECORDS

RESPONSIVENESS — ELEVATED

Mid-size firms respond fastest

Firms with 50 to 200 staff responded to [redacted] outreach at nearly twice the rate of larger firms. Leads with a lien filed in the last 30 days were the most responsive group in the sample.

SOURCE · ENGAGEMENT DATA

LIEN MATURITY — MODERATE

Liens nearing term in Georgia

Fourteen manufacturers in Georgia hold liens with [redacted] that reach term within six months. These firms are likely to seek refinancing and are flagged for early outreach next month.

SOURCE · FINANCIAL DATA

02 Lead segment watch

SEGMENT	TREND	VALUE
Logistics firms with new fleet liens	▲ Rising	HIGH
Manufacturers with liens nearing term	▲ Rising	ELEVATED
Healthcare practices with equipment liens	■ Steady	ELEVATED
Retail firms with receivables liens	▼ Easing	MODERATE

03 Analyst recommendations

01 Prioritize outreach to Texas logistics leads within 30 days of their lien filing date.

02 Prepare refinancing offers for the Georgia manufacturers ahead of lien maturity.

03 Deprioritize retail receivables leads until response rates recover next quarter.

DATA INPUTS THIS MONTH

UCC records 55% · Financials 28% · Engagement 17%

WHAT THE CLIENT RECEIVES

- → Monthly scored lead list
- → UCC filing analysis by segment
- → Responsiveness assessment
- → Analyst briefing on new trends

ILLUSTRATIVE SAMPLE. COMPANIES, LENDERS AND FIGURES ARE ANONYMIZED OR REDACTED. FULL REPORTS ARE DELIVERED TO CLIENTS ONLY.

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