

## Worksheet 4: Client Outreach Tracker

Connecticut's insurance capital and hedge fund corridor are its defining markets. Both reward professionalism, documentation, and consistent follow-through. Key targets pre-populated.

### Hartford — Insurance Capital

| Company / Contact                     | Phone / Email | Date Contacted | Follow-up Date | Notes / Status |
|---------------------------------------|---------------|----------------|----------------|----------------|
| Aetna / CVS Health (Hartford)         |               |                |                |                |
| The Hartford Financial Services Group |               |                |                |                |
| Cigna (Bloomfield)                    |               |                |                |                |
| Lincoln Financial (Hartford)          |               |                |                |                |
| Travelers Insurance (Hartford)        |               |                |                |                |
| CIGNA Healthcare                      |               |                |                |                |
|                                       |               |                |                |                |
|                                       |               |                |                |                |

### Hartford — Healthcare / Aerospace

| Company / Contact                       | Phone / Email | Date Contacted | Follow-up Date | Notes / Status |
|-----------------------------------------|---------------|----------------|----------------|----------------|
| Hartford Hospital / Hartford HealthCare |               |                |                |                |
| St. Francis Hospital (Hartford)         |               |                |                |                |
| Connecticut Children's Medical Center   |               |                |                |                |
| Pratt & Whitney (East Hartford)         |               |                |                |                |
| Raytheon Technologies (Farmington)      |               |                |                |                |
|                                         |               |                |                |                |
|                                         |               |                |                |                |

### Fairfield County — Financial Services

| Company / Contact               | Phone / Email | Date Contacted | Follow-up Date | Notes / Status |
|---------------------------------|---------------|----------------|----------------|----------------|
| UBS Asset Management (Stamford) |               |                |                |                |

| Company / Contact                 | Phone / Email | Date Contacted | Follow-up Date | Notes / Status |
|-----------------------------------|---------------|----------------|----------------|----------------|
| Charter Communications (Stamford) |               |                |                |                |
| Synchrony Financial (Stamford)    |               |                |                |                |
| Hennessy Capital (Greenwich)      |               |                |                |                |
| Bridgewater Associates (Westport) |               |                |                |                |
| Interactive Brokers (Greenwich)   |               |                |                |                |
|                                   |               |                |                |                |
|                                   |               |                |                |                |

### New Haven / Statewide

| Company / Contact                         | Phone / Email | Date Contacted | Follow-up Date | Notes / Status |
|-------------------------------------------|---------------|----------------|----------------|----------------|
| Yale New Haven Hospital                   |               |                |                |                |
| Yale University                           |               |                |                |                |
| Southern Connecticut State University     |               |                |                |                |
| Pfizer (Groton — New London County)       |               |                |                |                |
| Electric Boat / General Dynamics (Groton) |               |                |                |                |
|                                           |               |                |                |                |
|                                           |               |                |                |                |

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