NEW CLIENT POST-MEETING REPORT

TYPE: ENTITY________ INDIVIDUAL________

NAME: ____________________ HOME#: ____________________

ADDRESS: ____________________ WORK#: ____________________

____________________ REF. BY: ____________________

IF ENTITY: DO WE DO INDIVIDUAL

CONTACT NAME: ____________________ WORK FOR CONTACT? __________

TYPE OF BUSINESS: ____________________ TYPE OF ENTITY: ____________________

SERVICES WE WILL BE DOING FOR CLIENT:

- ☐ Stock Account
- ☐ Mutual Funds Account
- ☐ IRA Acocunt
- ☐ SEP-IRA / Keogh Plans / 401K/403B Plan
- ☐ IRA Rollover
- ☐ Annuity Account
- ☐ Budget Analysis and Tracking
- ☐ Net Worth Analysis
- ☐ Investments for Minors (UGMA/UTMA)
- ☐ Estate Planning
- ☐ College Fund Accumulation
- ☐ Health and Dental Plans
- ☐ Medicare Supplements
- ☐ Long- and Short-Term Disability Insurance
- ☐ Long-Term Care Insurance
- ☐ Term and Whole Life Insurance
- ☐ Property Insurance
- ☐ Worker's Compensation
- ☐ Automobile Insurance
- ☐ Business Owner Plans (BOP's)
- ☐ Cafeteria Plan (Section 125) Administration
- ☐ Individual Tax Returns (1040)
- ☐ Family Tax Planning
- ☐ Partnership Tax Returns
- ☐ Estate Tax Returns
- ☐ Estate and Trust Tax Strategies
- ☐ Fiduciary Tax Returns
- ☐ Sole Proprietorship Strategies
- ☐ Home Office Expertise
- ☐ Corporate Tax Returns
- ☐ Free Financial Strategy
- ☐ Business Acquisitions & Divestitures
- ☐ New Business Setups/Incorporations
- ☐ Employer Tax Reporting
- ☐ Corp. Minutes, By-laws & Meetings
- ☐ Business Planning
- ☐ General Ledger Preparation
- ☐ Financial Statement Preparation
- ☐ Benefits Analysis
- ☐ Marketing Plans
- ☐ Web Site Development

SERVICES WE MAY DO IN THE FUTURE:

- ☐ Stock Account
- ☐ Mutual Funds Account
- ☐ IRA Acocunt
- ☐ SEP-IRA / Keogh Plans / 401K/403B Plan
- ☐ IRA Rollover
- ☐ Annuity Account
- ☐ Budget Analysis and Tracking
- ☐ Net Worth Analysis
- ☐ Investments for Minors (UGMA/UTMA)
- ☐ Estate Planning
- ☐ College Fund Accumulation
- ☐ Health and Dental Plans
- ☐ Medicare Supplements
- ☐ Long- and Short-Term Disability Insurance
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- ☐ Marketing Plans
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