



Client # \_\_\_\_\_

## Welcome to H&S Companies

Today's Date \_\_\_\_\_

HOW DID YOU HEAR ABOUT US?

- Personal Referral                       Yellow Pages                       Internet                       Building/Sign  
 Please provide name of individual or business:                       BNI or Professional Organization  
 \_\_\_\_\_                       Other \_\_\_\_\_

We would like to thank them!

**The information below will be kept confidential as well as everything you share with us.**

### BUSINESS

Business Name (if applicable)	
Business Address	
Phone	Tax ID

### PERSONAL

	Taxpayer	Spouse
Name		
Social Security No.		
Date of Birth		
Mobile Phone		
Home Phone		
Email		
Address		
City/State/Zip		

### DEPENDENTS

Name	Social Security No.	Date of Birth

Please let us know if you would like to receive information on any of the other services H&S Companies can provide.

- |  |  |  |
|--|--|--|
| <p><b>INDIVIDUALS</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Investment Review</li> <li><input type="radio"/> Retirement Planning</li> <li><input type="radio"/> Tax Reduction Strategies</li> <li><input type="radio"/> Estate Planning</li> <li><input type="radio"/> Education Funding</li> </ul> | <p><b>BUSINESSES</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> I.T. Systems Review</li> <li><input type="radio"/> Payroll Services</li> <li><input type="radio"/> HR Audit</li> <li><input type="radio"/> Financing Assistance</li> <li><input type="radio"/> Fraud Protection</li> </ul> | <ul style="list-style-type: none"> <li><input type="radio"/> Succession Planning</li> <li><input type="radio"/> Strategic Planning</li> <li><input type="radio"/> Business Valuation</li> <li><input type="radio"/> Assurance &amp; Attestation</li> </ul> |
|--|--|--|