



Client # _____
 Partner _____
 Tax Form _____

Welcome to H&S Companies

HOW DID YOU HEAR ABOUT US?

Personal Referral
 Please provide name of individual or business:

Today's Date _____

Yellow Pages Internet Building/Sign
 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.

INDIVIDUALS

- Investment Review
- Retirement Planning
- Tax Reduction Strategies
- Estate Planning
- Education Funding

BUSINESSES

- I.T. Systems Review
- Payroll Services
- HR Audit
- Financing Assistance
- Fraud Protection

- Succession Planning
- Strategic Planning
- Business Valuation
- Assurance & Attestation