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| PRIOR CLIENT CALLING SHEET | | | | | | | | | | | |
| **Office #:** | | **Associate #:** | | **Date:** | | | **Page of** | | | | | | |
| Record result of all phone calls. Use the following to provide a reason if the client isn’t returning:   1. Preparing Own Return 2. Prepared by Competitor 3. Not Filing This Year 4. Prepared by Friend/Relative 5. Other – Provide Reason   Note whether an appointment was made, no answer, wrong #, voice mail, etc. | | | | | | | | | | | | | |
| **Client Name** | | | **Phone #** | | **1st call** | **2nd call** | | **A** | **B** | **C** | **D** | **E** | |
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| **Notes:** | | | | | | | | | | | | | |
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