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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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