

Interaction Listing
January 1, 2012 - February 29, 2012

From: Julie Gemer <Ace Advertising>

Type: Note

Date: 1/3/2012 10:24:23 AM

To: Liz Herald

Phone: 734-766-0000 679 (Business)

Subject: 2012 client meeting

Email: juliegemer@aceadvertising.com

Comment: Julie came in for meeting, brought spreadsheets, still needs stock info

From: Tom Smith <Smith, Tom & Kathleen>

Type: Phone Message

Date: 1/4/2012 1:47:15 PM

To: John Harden

Phone: 760-894-5566 (Home)

Subject: Called to verify meeting time

Email: cstomsmith@gmail.com

From: Michael Golden <Golden, Michael & Meredith>

Type: Note

Date: 1/11/2012 1:48:20 PM

To: Candy Cross

Phone: 520-568-2584 (Home)

Subject: Client meeting

Email: mmgolden1@g.mail.com

Comment: met with client gathered information for tax return

From: <Hanna, Jason>

Type: Note

Date: 2/10/2012 1:49:27 PM

To: Liz Herald

Phone: 800-664-2000 221 (Business)

Subject: Client Meeting

Email:

Comment: Jason is engaged but will not marry till next year...will help him with tax planning later this year