



February 10, 2012

 **Note: Client Meeting** 1:49 PM
(Hanna, Jason)

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

January 11, 2012


 **Note: Client meeting** 1:48 PM
Golden, Michael & Meredith (Golden, Michael & Meredith)

met with client gathered information for tax return

January 4, 2012

 **Please Call Back: Called to verify meeting time** 1:47 PM
Smith, Tom & Kathleen (Smith, Tom & Kathleen)

January 3, 2012

 **Note: 2012 client meeting** 10:24 AM
Gemen, Julie (Ace Advertising)

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