



I would like more information on the following professional and financial services:

Plan Consulting

- Comprehensive Financial Planning
- Retirement Planning
- Estate Planning
- Business Planning

Individual and Family Services

- Investment Planning
- College Planning
- Retirement Planning
 - Distribution Management
- Investment Management
- Insurance Planning
- Health Insurance
- Tax and Accounting
- Other _____

Business Services

- Investment Planning
- Human Resources Planning
 - Key-Person Benefit Planning
 - Retirement Planning
 - Health Insurance Planning
 - Voluntary Benefit Planning
- Asset Management
- Other _____
- Insurance Planning
- Tax and Accounting
 - Tax Preparation
 - Bookkeeping
 - Payroll
- Succession Planning
- Entity Planning
- Incorporation Planning

I am not interested in any other services at this time.

I have read the list of services provided by Gorden's Tax Service, Inc. and expressly request information on the topics I have marked. Contact may be by telephone, mail, or email. I understand this is not an all-inclusive list of services and that it is my responsibility to ask about other topics not covered by this form.

Printed Name Phone Number Email

Signature Date

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