

**CLIENT FILE**

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Company \_\_\_\_\_ Web Address \_\_\_\_\_  
Address \_\_\_\_\_

Source of Lead \_\_\_\_\_ Date of Lead \_\_\_\_\_

• Contact \_\_\_\_\_  
Telephone \_\_\_\_\_  
E-mail \_\_\_\_\_

• Contact \_\_\_\_\_  
Telephone \_\_\_\_\_  
E-mail \_\_\_\_\_

• Contact \_\_\_\_\_  
Telephone \_\_\_\_\_  
E-mail \_\_\_\_\_

Date	Type*	Conversation/Notes	Follow-up Date

\* P = Personal    T = Telephone    F = Fax    M = Mail    E = E-mail

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