**Client’s Information Sheet:**

Client’s Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Client’s Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Client’s Phone#: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* Interested ![C:\Users\Kathleen\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FQMWWPQQ\Square_-_black_simple.svg[1].png]()Email/Phone Call ![C:\Users\Kathleen\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FQMWWPQQ\Square_-_black_simple.svg[1].png]()Zoom Meeting ![C:\Users\Kathleen\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FQMWWPQQ\Square_-_black_simple.svg[1].png]()Enrolled
* Email #1 Congratulations Date Sent \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Email #2 Month 2 Update Date Sent \_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Email #3 Month 3 Update Date Sent\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Email #4 Month 4 Update Date Sent\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Client’s Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Client’s Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Client’s Phone#: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* Interested ![C:\Users\Kathleen\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FQMWWPQQ\Square_-_black_simple.svg[1].png]()Email/Phone Call ![C:\Users\Kathleen\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FQMWWPQQ\Square_-_black_simple.svg[1].png]()Zoom Meeting ![C:\Users\Kathleen\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FQMWWPQQ\Square_-_black_simple.svg[1].png]()Enrolled
* Email #1 Congratulations Date Sent \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Email #2 Month 2 Update Date Sent \_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Email #3 Month 3 Update Date Sent\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Email #4 Month 4 Update Date Sent\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Client’s Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Client’s Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Client’s Phone#: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* Interested ![C:\Users\Kathleen\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FQMWWPQQ\Square_-_black_simple.svg[1].png]()Email/Phone Call ![C:\Users\Kathleen\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FQMWWPQQ\Square_-_black_simple.svg[1].png]()Zoom Meeting ![C:\Users\Kathleen\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FQMWWPQQ\Square_-_black_simple.svg[1].png]()Enrolled
* Email #1 Congratulations Date Sent \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Email #2 Month 2 Update Date Sent \_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Email #3 Month 3 Update Date Sent\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Email #4 Month 4 Update Date Sent\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_