



**“Before you call anybody about your Business, Finances, Money, or Taxes...CALL US”**

## **We specialize in more than just Tax Preparation...**

On January 5, 2004, I established TCL Financial & Tax Services just offering Tax Preparation Services. I included the word “Financial” in the company’s name because I knew eventually I would want to offer an array of Financial Services to our current and potential clients.

In addition to Tax Preparation, below is a list of all the other Financial Services we currently offer. After reviewing each item, place a checkmark in the box next to the service(s) that interest you. Within 24 hours (excluding weekends), one of our representatives will contact you to discuss the service(s) you selected.

Sincerely,

*Tim C. Lee*

Tim C. Lee  
CEO & Founder

### **FINANCIAL SERVICES**

- ☐ **Budgeting Techniques**
- ☐ **Business Bookkeeping**
- ☐ **Business Start-Up and Development**
- ☐ **Credit Restoration**
- ☐ **Debt Elimination Techniques**
- ☐ **Estate Planning**
- ☐ **Identity Theft Insurance**
- ☐ **Life Insurance**
- ☐ **Notary Public**
- ☐ **Pre-Paid Legal Protection**
- ☐ **Saving for Retirement**
- ☐ **I am not interested at this time!**

Today’s Date: \_\_\_\_\_

Current or Potential Client’s Name(s): \_\_\_\_\_

Contact Phone Number(s): \_\_\_\_\_

TCL Representative’s Printed Name: \_\_\_\_\_