



We specialize in more than just Tax Preparation...

On January 5, 2004, I established TCL Financial & Tax Services. I included the word "Financial" in the company's name because I knew that one day I would want to offer Financial Services to our current and potential clients. Guess what? That day has come!

Below is a list of all the Financial Services we offer. After reviewing each item, place a checkmark in the box next to the service(s) that you would like to receive more information about.

Sincerely,

Tim C. Lee

Tim C. Lee
CEO & Founder

FINANCIAL SERVICES

- ☐ **Business Start-Up and Development**
- ☐ **Budgeting Techniques**
- ☐ **Credit Restoration**
- ☐ **Debt Elimination Techniques**
- ☐ **Estate Planning**
- ☐ **Identity Theft Insurance**
- ☐ **Life Insurance**
- ☐ **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: _____