



HK FINANCIAL SERVICES

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Script

CPA: "We have made a commitment to our clients to address their entire financial situation by adding insurance planning to the list of services we provide. This will allow us to best serve our clients by identifying and addressing risk and how it relates to tax planning. Because this is so important we would recommend an audit and analysis of your insurance portfolio to ensure your plan is structured properly, performing adequately, and that you are not paying too much for it. Our team will call you to answer any questions and initiate the audit." (No charge discussion optional.)

HKFS Work Order Form

Client Name: _____

Meeting Date: _____

Client Address: _____

Client Phone #: _____

CPA Name: _____

Financial Services Need:	Action Steps:
<input type="checkbox"/> Life Insurance Audit	<input type="checkbox"/> CPA to follow up by: _____
<input type="checkbox"/> Other _____	<input type="checkbox"/> FA to follow up by: _____
	<input type="checkbox"/> CPA/FA to follow up by: _____

Notes: