

Please check the box below if you would like to have someone contact you regarding:

- Cryptocurrency Investment and Education
- Investment Portfolio Review
- Retirement Planning
- IRA/Roth IRA/401 K/SIMPLE Plans/SEP Plans
- Mutual Funds
- Life Insurance
- Health Insurance or Long Term Care
- Bookkeeping, Accounting and Payroll Service
- Business Start Up
- Estate Planning (Wills, Trusts, Power of Attorneys, Living Wills, Lady Bird Deed)

Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Email: \_\_\_\_\_

Best time to call: \_\_\_\_\_ AM / PM