



Tax • Investments • Insurance

**Services Checklist**

Client - \_\_\_\_\_

Date - \_\_\_\_\_

Dear Client,

As an added service to our tax preparation, we would like to offer you complimentary services on the following areas. At Simons, we have qualified experts and as a valued client, we would like to be able to help you with all your financial needs.

**Investments**

- Retirement Planning
- College Planning
- Open an IRA
- Small Business Retirement Plan
- Rollover a 401(k)
- Investing
- Annuities
- Debt Reduction/Cash Flow
- Tax Planning

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**Insurance**

- Life Insurance
- Health Insurance
- Small Business Health Insurance
- Medicare Supplements
- Disability Insurance
- Long-Term Care Insurance
- Final Needs Insurance
- Auto Insurance Review or Quote
- Home Insurance Review or Quote
- Small Business Insurance Review or Quote


**Tax**

- Tax Return and/or Tax Planning
- Bookkeeping


\*Securities offered through H.D. Vest Investment Services<sup>sm</sup>, Member SIPC.  
 +Advisory Services offered through H.D. Vest Advisory Services<sup>sm</sup>.