

FIRM INFORMATION	N		
Firm Name			
Contact Person			
Address			
City	State	ZIP Code _	
Phone		Fax	
Email			
Core Disciplines			
Percent of Gross Billings			
Accounting	Financial Planning		Consulting
Attest	Other		
Total Gross Billings			
Client Demograp	HICS		
Percent of Client Base			
AGES	HOUSEHOLD INCOME		NET WORTH
20-40	\$100,000 and below		\$0-\$500K
41-60	\$100,000-\$250,000		\$500K-\$1 Million
61 and Above	\$250,000 and above		\$1 Million and Above
OCCUPATIONS			
Professionals	Bus.Owners/Self-Employed _		Trades/Industry/Other
Executive/Managers	Non-Profit/Public Employees	3	Retirees
# of Accountants	# of Business Clients		# of Individual Clients
Admin Support	OBAs		IIPs

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