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Tax season is the perfect time to plant seeds to harvest next quarter. We recently developed an [Insurance Evaluation Form](#) to use with clients during your review process.

When you walk into the doctor's office, why do they hand you a clipboard with a questionnaire? Because it is an essential part of pre-visit planning. It can help make your client visits more successful—giving you time to focus on what matters most to your clients.

Your clients can use this [PDF](#) as a fillable form and email it to you, or complete and print it before their next visit.

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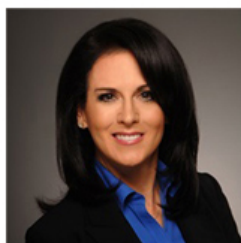
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