- 1. Annual Reviews- Yes, 10 years,
- 2. Newsletter Yes
- 3. Website- Yes
- 4. CPA/ Accounting Relationships-
- 5. Who?-
 - 1. Seniors-age 70/
 - 2. 10%, Business owners/ 50%
 - 3. professionals/80%-
- 6. Seminars –No. Client Appreciation