

Database Info

Customize for YOUR BUSINESS and YOUR CLIENTS

Contact Info

Name	First	Last	Preferred	Pronoun	
Mailing Address		City	Province	Postal	Country
Home	Work	Cell	Fax	Skype	Zoom
Email					

Personal

Birthdate	Anniversary	Hobbies	Kids
Pets	Spouse	Industry	Income Level

Source

Referral**	Networking**	Advertising**	Website
Media**	Trade Show**	Flyer**	Social Media**

Products

Products they have	Products they don't have
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Communications

Preferred Method (email, phone, text, face to face)			
Thank Yous	Birthdays	Anniversaries	Other
Notes and tracking			

Legal / CYA

Letter of Engagement	
Privacy Policy	Consent Forms

Reporting / Sorting

Geographical	Source of client	Profitability of Client
Products	Sales Opportunities	