



# Client Profile Form

*Let us get to know you so we can serve you better*

Please fill in the information below and fax, email or mail it to:  
Accion Group San Antonio  
2810 Thousand Oaks, #215  
San Antonio, TX 78230  
Fax: 888-559-6729

## **Personal Information**

Name \_\_\_\_\_

Home Address \_\_\_\_\_

Home Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Home Phone \_\_\_\_\_

Cell Phone \_\_\_\_\_

Fax Number \_\_\_\_\_

Email Address \_\_\_\_\_

Work Address \_\_\_\_\_

Work Address \_\_\_\_\_

Work Phone \_\_\_\_\_

### **Preferred Method of Contact:**

Cell Phone \_\_\_\_\_

Home Phone \_\_\_\_\_

Work Phone \_\_\_\_\_

Email \_\_\_\_\_

Birthday: Month \_\_\_\_\_ Day \_\_\_\_\_

### **Family Information**

Family member's names \_\_\_\_\_

\_\_\_\_\_

Pets \_\_\_\_\_

## **Other Information**

### **How did you hear about us?**

- Website
- Referral \_\_\_\_\_
- Advertisement
- Mailing
- Other

### **I am most interested in:**

- Errand service
- Personal shopping
- Event planning
- Other \_\_\_\_\_

### **I/We:**

- Travel frequently
- Entertain frequently
- Need someone to coordinate various aspects
- of life

### **I imagine that I will utilize Fini Concierge approximately:**

- Occasionally
- 1-4 hours/month
- 4-8 hours/month
- 8-12 hours/month
- 14+ hours/month

### **I would prefer:**

- My credit card be charged
- To pay by cash