

Client Profile: One Size Fits One

Transactions
↳ Experiences

Name of Business / Entity

Preferred Name

Name Pronunciation / Rhymes With

Support Staff They Work With

Communication Preferences

Zoom vs In-Person?

Client Hobbies / Activities

Spouse / Partner

Spouse Hobbies / Activities

Children Names / Ages

Children's Hobbies / Activities

Favorite Drink

Favorite Drink at Office Meetings

Coffee Order

Food Allergies / Preferences

Favorite Snacks

Date of Birth

Anniversary Date

Workiversary / Founding

Favorite Sports / Teams

Things Their Staff Likes

Seasonal Travel Location and Timing

Musical Tastes / Groups / Concerts

Charities They Support

Why did they leave their last CPA?

What's in the photos in their office?

Holidays Celebrated