## HS3 Get Involved Discovery Form How May We Help? Got a Real Estate, Finance, Business, or Other Project?

Free Consultation when we receive this form



**All Business Projects** 

There is a 3-phase process for all projects
1) Discovery, 2) Agreements, 3) Implementation

## REF Codes - Communication = C, Real Estate = RE, Finance = F, Business = B, Other = O

Communication
Real Estate
Finance
Business

Marketing, Website, Social-Media, Referral, Email, Meeting, Training, Convention, Other Foreclosure, Investor, Project, Developer, Loan, Partnership, Consultation, Other

Real Estate, Business, Personal, Partnership, Consultation, Other

Transaction, Partnership, Loans, Tax Incentives, Medical Insurance Underpayments, Other

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	Subject	Ref Code	Action Owner/s	Client Details for each applicable Subject Line Item  Double-click on each highlight space below and Type	
1.	Communication Provide how we met, Subject, and Preference?	C	<u>Client</u>	How did we Meet? - Subject? - Communication Preference? -	
2.	Goals (Detailed Overview) Include a brief BIO including what you do, how you want to "Get Involved", including which service/s and why, etc. If referring someone else or another business, include it on this line. We will incent you!		<u>Client</u>	Double click in yellow block and type. Unlimited space!	
3.	Provide background info. (I.E. Name and Entity Name, Address, Phone, Email, etc.)		<u>Client</u>	Double click in yellow block and type. Unlimited space!	
4.	Strategic Referral Partnership? Yes or No Explain your interest in a Strategic Partnership.		Yes or No	Double click in yellow block and type. Unlimited space!	
5.	Real Estate Services? Project Help, Foreclosure Surplus Money, Loans, etc., for Residential and Commercial Properties.		TBD	Double click in yellow block and type. Unlimited space!	
6.	Business Services? Significant Tax Incentives / Loans / Office Services / Expense Reduction / Assets		<u>TBD</u>	Double click in yellow block and type. Unlimited space!	
7.	Medical Underpayments? Large Sums of Money Found for Medical Providers 100% of the Time!		<u>TBD</u>	Double click in yellow block and type. Unlimited space!	