MEMO TEMPLATE INSTRUCTIONS

Please use the following template when creating your intake memo after your client interview. You may need to enable editing and content in order to use this form. After doing so, click the View menu and Macro buttons at the top of the page if you cannot see the hidden text/instruction or the gridlines for the cells.

Click here to enable editing

Click here to turn on the macros for this document

Type in the information requested in each empty cell

If you can’t see the gridlines or hidden text, go to the View menu, then...

click here to see the Macros.
Select each Macro and click Run to show or hide the gridlines and hidden text.