

# Client Balance Action Report

**Comments:**

Firm policy is to send an email in the form of Mild\_Reminder\_1.docx to all clients with balances over \$10,000. Client balances less than \$100 not reported.

Contact Name   Company Name	Primary Email Address	Primary Phone	Alternate Phone	Balance
James Bishop   Wellington Industries	<a href="mailto:j.bishop@wellind.net">j.bishop@wellind.net</a>	954-622-1234	9540622-1126	\$ 16,256.00
Abraham J. Williams   A. J. Williams & Co. Inc.	<a href="mailto:ajwilliams@someisp.com">ajwilliams@someisp.com</a>	415-555-6678	415-555-6789	\$ 438.75
Cindy LaFleur   The Flower Shop	<a href="mailto:cindydearest@theflowershop.com">cindydearest@theflowershop.com</a>	925-555-8741	925-555-1234	\$ 12,583.10
		<b>Firm Total</b>		<u><u>\$ 29,277.85</u></u>