



Name: \_\_\_\_\_

Appointment Date: \_\_\_\_\_

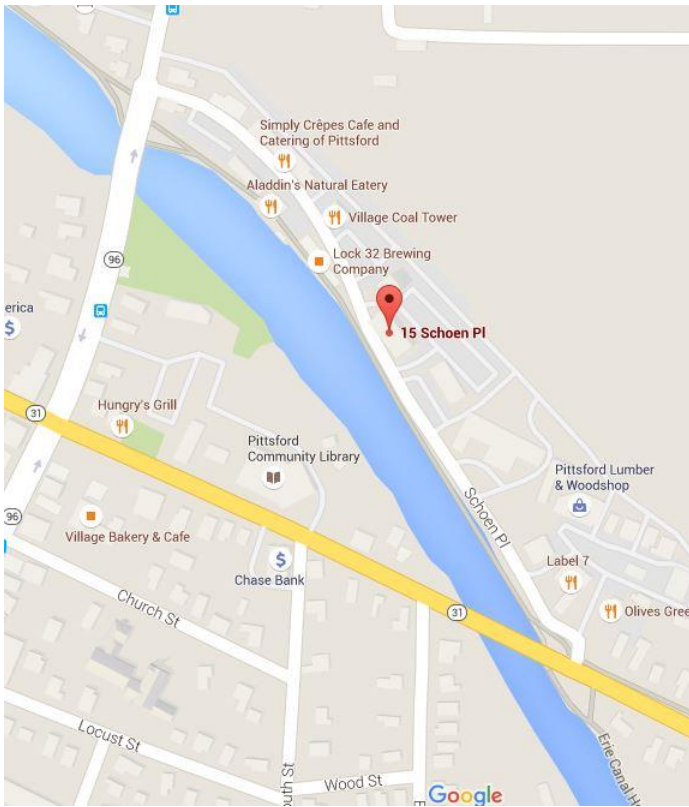
Appointment Time: \_\_\_\_\_

**What to Bring:**

Please bring the following items so we can better understand your current financial situation:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**Where our office is located:** 15 Schoen Place 2<sup>nd</sup> Floor West, Pittsford, NY 14534 \*(building front below)



**Where to Park:** Please park anywhere behind our building. The driveway is on the left side of the building if you are facing it. (See photo above^) *\*\*Tenants Only\*\* sign refers to clients as well\**

**Building Directions:** Please enter the building through the door in the back. Proceed up the stairs or take the elevator to the second floor. Follow the signs that say “iTP Partners, LLC” and you will kindly be greeted by someone when you walk in.

If you have any questions or concerns, please contact:

Dan DiPaola

(518) 290-8345 | [ddipaola@itppartners.com](mailto:ddipaola@itppartners.com) | [www.itppartners.com](http://www.itppartners.com)



## *For Your Next Appointment:*

Appointment Date: \_\_\_\_\_

Appointment Time: \_\_\_\_\_

Location: \_\_\_\_\_

### **What to Bring for Next Appointment:**

Please bring the following items so we can better understand your current financial situation:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Notes:

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15 Schoen Place, 2<sup>nd</sup> Floor  
Pittsford, NY 14534