



LET'S GET ORGANISED...

| | | | |
|---------------------------|--|------------------------|--|
| DATE: | | REFERRED BY: | |
| CLIENT NAME: | | PARTNER'S NAME: | |
| OCCUPATION: | | CHILDREN: | |
| CELLPHONE NUMBER: | | WORK NUMBER: | |
| HOME NUMBER: | | FAX NUMBER: | |
| HOME ADDRESS: | | WORK ADDRESS: | |
| | | | |
| | | | |
| | | | |
| ID NUMBER: | | TAX NUMBER: | |
| GENERAL LIFESTYLE: | | | |

| TASK TYPE | TASK | INTERESTED? |
|--------------------------------|---|-------------|
| GENERAL HOUSEHOLD | Groceries and goods management/shopping | |
| | Ordering of specialty deli foods, wine and specialty liquors | |
| | Dry cleaning delivery and collection | |
| | Housekeeping co-ordination | |
| | Research, screen, schedule and co-ordinate contractors for cleaning, landscaping, household repairs and emergencies | |
| | Organisation of rooms, closets and collections | |
| ERRANDS | DVD pick ups and returns | |
| | Pick-up and delivery of prescriptions | |
| | Collection and return of rented formal wear | |
| | Bank deposits, bill and municipal payments | |
| | Post office and courier errands | |
| | Drop off of payments, SARS documents etc | |
| | Library pick up and returns | |
| | Drop off and pick up cell phone repairs | |
| Subscriptions and renewals | | |
| PERSONAL SHOPPING | Shopping and gift buying – both personal and corporate | |
| | Wrapping and delivery of gifts | |
| | Holiday season gift buying | |
| | Personal shopping assistance | |
| | Returns and exchanges | |
| | Comparative price quotes i.e. for homeware and household goods | |
| ADMINISTRATIVE SERVICES | Back-to-school, items for school fundraisers and school outing | |
| | Organising of vehicle for insurance assessments/servicing and repair | |
| | Processing applications, claims and queries | |
| | Licence renewals | |
| | Payment of traffic fines | |
| | Booking salon and spa treatments and personal appointments | |
| | Special date reminders | |
| | Booking golf tee off times | |
| | Internet research | |
| | Product and price comparisons | |
| | General filing and emailing | |
| TRAVEL | Organising airport collection and drop offs | |
| | Passport and Visa applications | |
| | Car and limousine hire | |
| | Helicopter and jet charters | |
| | Holidays, tours and flights services and research | |
| | Maps and directions assistance | |
| | Last minute pre holiday errands and shopping | |

| TASK TYPE | TASK | INTERESTED? |
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