

cases almost impossible unless the person creating the document also furnishes the summary for reference purposes. This is especially true in scientific matters.

NEW CLIENT RECORD

Client Name		Transfer File No.
Client Address	Phone	<u>Location</u>
File Title		Date File Closed
Cross Ref.		Date Client Papers Returned
Service to Be Performed		Date File Reopened
Partner in Charge	Initial Work To	Date Ret'd to Transfer
Billing Attorney	Fee Memo Filed In Fee File?	
Source of Business		
Date Issued	Issued By	

A good example of a multipurpose index card is exhibited here. It can be adapted to a great many uses in the filing operations of trusts and foundations. While it was used for a large legal firm and is presented in its original form as they used it, you can see the variety of information contained therein which is very much the same as used in your work.

It was printed in sets of four, each copy being of a different color. The original became the main index copy and the others were used for secondary index locations or for cross-reference purposes. For instance, a scholarship could be awarded to a person and the other copies used for follow-up on progress, or grade maintenance. Another copy could show the nature of his research and the titles or subject matter or any reports submitted.

The form itself could be used for a multitude of purposes including a capsule file of the rejected applicants. Cards like this are useful in compiling reports that might someday be called for as to your activity and its results if they are properly maintained.