



Client Intake Form

(This intake form can be used for both new and existing clients. Complete only those sections for information that is not already known.)

GENERAL INFORMATION

Name of company: _____

DBA (if applicable): _____

Physical address: _____

City, State, Zip: _____

Mailing address if different: _____

Contact person: _____

Title: _____

Office phone: _____ Cell phone: _____

Fax: _____ Email: _____

Website: _____

If a new client, how did you find me? _____

Initial Interview Date: _____

ORGANIZATION AND HISTORY

Legal entity of business: Sole proprietorship General partnership
 Limited partnership LLC
 C corporation S corporation

Number of partners/shareholders (if not sole proprietorship): _____

What percentage of the business do you own? _____

What is your business background?

Year established: _____

Year purchased (if applicable): _____

Number of employees: Full time _____

Part time _____

Basic organizational chart

(list positions, names, major areas of responsibility, and if individual may be interviewed, if necessary):

FINANCIAL INFORMATION

Historical profit trend: Increasing Decreasing Stable

Profit/Loss trend notes (*briefly describe*):

Financial statements prepared: Internally Externally

Name of bookkeeping firm, if external: _____

Financial statements available: None 3 years 5 years

Are these: Annual statements Quarterly statements Monthly

OPERATIONS

Briefly describe your business (or idea for a new start-up business).

Who is your main target market?

Who are your competitors?

What advantage do you have over your competition?

Is there anything particularly unique to your business that I should know about?

Do you have a written business plan? Yes No

If yes, when was the last time it was revised? _____

What do you see as the major challenges of your business and why?

What are your short-term goals (1 year)?

What are your long-term goals (5 years)?

What are your expectations of a consulting engagement?

Have you had consultation services in the past?

Yes No

If yes, please describe:

Were you pleased with the results? Why or why not?

Is there anything particularly unique to this engagement that I should know about?

Preferred commencement date: _____

Preferred completion date: _____