



North Texas Small Business Development Centers SBDC Client Intake Form



CLIENT NAME (Last, First, MI)			EMAIL		
POSITION Owner/Sole Proprietorship Employee President Vice-President Partner Other: _____					
WORK PHONE			CELL PHONE		
HOME PHONE			FAX		
MAILING ADDRESS			CITY, STATE, ZIP CODE		
GENDER	RACE (mark one or more)	ETHNICITY	VETERAN STATUS	RESERVIST STATUS	DO YOU HAVE A DISABILITY?
Male	Asian	Non-Hispanic	Non-Veteran	None	Yes
Female	Native Hawaiian or Pacific Islander	Hispanic	Service-Disabled	National Guard	No
	Black or African American		Veteran	National Guard - Active Duty	
	Native American or Alaska Native			Reservist	
	White			Reservist - Active Duty	

COMPANY INFORMATION

CURRENTLY IN BUSINESS? Yes Indicate Month/Day/Year established business ____ / ____ / ____ No					
If in business but you want to explore a new business, Please specify the area of interest: _____					
If in business, are you currently EXPORTING? Yes, Please indicate the Countries below. No Not yet but interested					
Export Countries: _____					
COMPANY NAME (IF APPLICABLE)			WEBSITE		
PHYSICAL ADDRESS OF BUSINESS			CITY, STATE ZIP CODE		
WHAT PROMPTED YOU TO CONTACT US (REFERRED FROM)					
Advertising/Marketing Chamber of Commerce Client/Word of Mouth		College/University Email Media/TV/Radio	Lender Local EDC News Outlet	SBA Network SBDC Training Event/Conf.	Website Social Media (please list)
BUSINESS OWNERSHIP Business ownership gender	BUSINESS SIZE Disadvantaged - Small Large Minority Owned - Small Other Small	BUSINESS LEGAL ENTITY Sole Proprietorship Partnership S-Corporation LLC Corporation	HOME-BASED? Yes No DO YOU CONDUCT YOUR BUSINESS ONLINE? Yes No	8 (A) CERTIFIED Yes No	SBA RELATIONSHIP Applicant Borrower COC Procurement Assistance Technical Assistance
TYPE OF BUSINESS Manufacturing Wholesale Construction Retail Services Other: _____					
PRODUCTS/SERVICES: _____ NAICS CODE(S): _____ (SBDC staff can assist with NAICS code for your business)					

WHAT ARE YOUR TOTAL NUMBER OF EMPLOYEES ____ Full Time ____ Part Time How many are engaged in the exporting aspect of the business? _____	FOR THE MOST RECENT FULL BUSINESS YEAR, PLEASE PROVIDE Gross Revenue/Sales (GRS) \$ _____ +Profits/-Losses \$ _____
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I request business-counseling service from the Small Business Administration (SBA) or an SBA Resource Partner. I agree to cooperate should I be selected to participate in surveys designed to evaluate SBA services. I permit SBA or its agent the use of my name and address for SBA surveys and information mailings regarding SBA products and services (Yes No). I understand that any information disclosed will be held in strict confidence. (SBA will not provide your personal information to commercial entities.) I authorize SBA to furnish relevant information to the assigned management counselor(s). I further understand that the counselor(s) agrees not to: 1) recommend goods or services from sources in which he/she has an interest, and 2) accept fees or commissions developing from this counseling relationship. In consideration of the counselor(s) furnishing management or technical Assistance, I waive all claims against SBA personnel, and that of its Resource Partners and host organizations, arising from this Assistance. Please note: The estimated burden for completing this form is 3 minutes. You are not required to respond to any collection information unless it displays a currently valid OMB approval number. Comments on the burden should be sent to: U.S. Small Business Administration, 409 3rd Street, SW, Washington, DC 20416, and to: Desk Officer SBA, Office of Management and Budget, New Executive Office Building, Room 10202, Washington, D.C., 20503. OMB Approval 3245-0324). PLEASE DO NOT SEND FORMS TO OMB. **SBDC services are not available to individuals or entities that have been debarred or suspended by the federal government. By agreeing to receive assistance from the SBDC with your signature on this form, you are self-certifying that you are not currently federally debarred or suspended and also agree to cease using SBDC services if you become federally debarred or suspended in the future.**

CLIENT SIGNATURE	DATE
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