



Appointment Intake Guide

- ☐ English
☐ Spanish
☐ Other

Contact Information

1. Date of Contact: _____ ☐ New Client ☐ Existing Client (# _____)
2. Name of Individual(s): _____
3. Contact Phone: _____ Email: _____
4. Are you in business now or are you looking to start a business? ☐ In Business ☐ Not in Business

Existing Business Only:

- a. Business Name (if applicable): _____
- b. Name of Owner(s) (if different): _____
- c. Business Phone: _____
- d. Date Business was Established: _____
- e. Legal Entity, if known: ☐ Sole Prop ☐ Partnership ☐ Corp ☐ LLC

5. Name(s) of other individuals/contacts who should be included in SBDC meetings? (Partners, etc.)

6. Where is your business located now or likely to be located? (e.g. Address/City/County)

7. Who referred you to the SBDC? Name _____ Organization _____
8. Business Description/Idea _____
9. When are you planning to start/expand your business?
☐ 0 – 3 months ☐ 4 – 6 months ☐ 6 – 12 months ☐ In over a year ☐ Not sure
10. Assistance Requested/Needed:
☐ Starting business ☐ Expanding business ☐ Buying business ☐ Selling business
☐ Business plan development ☐ Existing business plan review (if so, bring to meeting)
☐ Business loan assistance: Amount needed \$ _____ Purpose _____
☐ Other: _____
☐ Business training (type): _____

Notes: _____

Advisor Assigned: _____

www.sam.gov **Verified Business Entity:** ☐ Yes Notes: _____

Appointment Date: _____ Time: _____ AM / PM

Location: ☐ SBDC Office ☐ Client Site ☐ Other: _____

Referred to Workshop (title): _____ Date: _____ Time: _____ AM / PM

Inform contact of the following:

- ☐ Please allow up to 2 hours for your initial meeting as we will need to gather information to determine how best assist you.
- ☐ Bring any information related to your business or idea. For example: research, business plan, menu, etc.
- ☐ It is very important to be on time for you appointment.
- ☐ If for some reason you cannot make your appointment, 24-hour advance notice is appreciated.
- ☐ Do you know where the SBDC office is located? (If not, provide location information.)
- ☐ You will receive an email with your appointment date and time, as well as a link to our online registration website (e-center). Please register for SBDC services prior to your appointment.

NOTE: If contact does not have email:

- ☐ Please arrive 10 minutes prior to your appointment to allow time to register.

SBDC Actions:

- ☐ Send appointment reminder email to client
- ☐ Send delayed appointment reminder
- ☐ Add appointment to Advisor's calendar

Form Distribution:

- ☐ Save form in "Pre-client documents" electronic folder
- ☐ Copy to Director
- ☐ Original to Advisor
- ☐ Upload form to Neoserra