



## MASTER BUSINESS SUPPORT INTAKE FORM

*(Required for all business clients)*

### 1. Client & Business Overview

**Legal Name:**

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**Business Name (if applicable):**

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**Business Structure:**

Sole Proprietor  LLC  Corporation  Nonprofit  Not Yet Formed

**State of Registration:**

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**Years in Operation:**

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**Primary Contact Email:**

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**Phone Number:**

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**Website / Online Presence:**

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### 2. Current Business Status

Which best describes your current stage?

- Idea stage
- Early startup
- Operating but inconsistent
- Established but stuck
- Scaling / restructuring



What is currently working in your business?

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What feels confusing, overwhelming, or broken?

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### 3. Primary Reason for Seeking Business Support

What do you want help with **right now**?

- Business clarity & direction
- Documentation & structure
- Branding & messaging
- Operations & workflow
- Funding / grants
- Compliance & organization
- Other: \_\_\_\_\_

Briefly describe the challenge:

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### 4. Goals & Desired Outcomes

What does success look like at the end of this engagement?

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What are your top 3 priorities?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_



Timeline expectations:

- ASAP  30 days  60–90 days  Flexible
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### 5. Decision-Making & Expectations

Are you the final decision-maker?

- Yes  No (please explain) \_\_\_\_\_

Preferred communication style:

- Direct  Collaborative  Written  Calls  Combination

Anything that has NOT worked with previous consultants?

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### 6. Notes for Consultant (Internal Use ONLY)

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### PROJECT-SPECIFIC INTAKE MODULES

*(Attach only what is applicable)*

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#### MODULE A: Business Formation & Structure Intake

Are you currently registered with the state?

- Yes  No  In Progress

Do you have:

- EIN  
 Operating Agreement  
 Business bank account



- Accounting system
- Corporate records / binder

What do you need help organizing or correcting?

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### **MODULE B: Branding & Messaging Intake**

How do you currently describe your business?

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Who is your target audience?

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Brand personality (check all that apply):

- Professional
- Warm
- Bold
- Minimal
- Creative
- Corporate
- Spiritual-light

What should people feel when they interact with your brand?

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### **MODULE C: Operations & Workflow Intake**

What services or products do you offer?

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How do clients currently find you?

- Website
- Social media
- Referrals
- Marketplace
- Other

Where do things slow down or fall apart?

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Do you have written processes?

- None
- Some
- Yes (please list)

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**MODULE D: Grant / Funding Readiness Intake**

Have you ever applied for funding?

- Yes  No

Type of funding sought:

- Grants  Loans  Assistance programs  Not sure

Do you currently have:

- Business plan  
 Budget  
 Financial statements  
 Mission statement

What is the funding for?

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**MODULE E: Compliance & Documentation Intake**

Do you need help with:

- Policies & procedures  
 Privacy / compliance docs  
 Contracts or templates  
 Internal documentation

Industry (if regulated):

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Any compliance concerns?

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