



Counseling Information Form

Client Number:
Location Code:
Initials of Data Inputter:

1. Name of the Office Providing the Service _____ 1a. Type of Client: Face to Face Online
2. City/State of Office Location _____ Telephone

PART I: Client Request for Counseling

3. Client Name (Name of the person completing the form/representative of the business) (Last, First, MI)		4. Email	
5. Telephone Primary _____ Secondary _____		6. Fax	
7. Street Address/PO Box (give business address if currently in business)		8. City	9. State
		10. Zip	+4
<p>11. 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 <input type="checkbox"/> No <input type="checkbox"/>). 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 18 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.</p>			
12. Preferred date & time for appointment Date: _____ Time: _____		13. Client Signature _____ Date: _____	

PART II: Client Intake (to be completed by all Clients)

14. Race (mark one or more) <input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Asian <input type="checkbox"/> Black or African American <input type="checkbox"/> Native Hawaiian or Other Pacific Islander <input type="checkbox"/> White		15. Ethnicity <input type="checkbox"/> Hispanic or Latino <input type="checkbox"/> Not Hispanic or Latino		16. Gender <input type="checkbox"/> Male <input type="checkbox"/> Female		17. Do you consider yourself a person with a disability? <input type="checkbox"/> Yes <input type="checkbox"/> No		
18. Veteran Status <input type="checkbox"/> Non-Veteran <input type="checkbox"/> Veteran <input type="checkbox"/> Service-Disabled Veteran			18a. Military Status <input type="checkbox"/> Member of Reserve or National Guard <input type="checkbox"/> On Active Duty					
19. What prompted you to contact us? (mark all that apply) <input type="checkbox"/> SBA District <input type="checkbox"/> SBA Web site <input type="checkbox"/> Other Client <input type="checkbox"/> Chamber of Commerce <input type="checkbox"/> Lender <input type="checkbox"/> Magazine <input type="checkbox"/> Educational Institution <input type="checkbox"/> Business Owner <input type="checkbox"/> Internet <input type="checkbox"/> Local Economic Development Official <input type="checkbox"/> Television/Radio <input type="checkbox"/> Newspaper <input type="checkbox"/> Word of Mouth <input type="checkbox"/> Other (specify) _____								
20. Are you currently in business? <input type="checkbox"/> Yes <input type="checkbox"/> No (if no, skip to 30)				21. Name of Company				
22. Type of Business (choose primary category) <input type="checkbox"/> Mining <input type="checkbox"/> Manufacturing <input type="checkbox"/> Real Estate & Rental & Leasing <input type="checkbox"/> Professional, Scientific & Technical Services <input type="checkbox"/> Utilities <input type="checkbox"/> Finance & Insurance <input type="checkbox"/> Health Care & Social Assistance <input type="checkbox"/> Management of Companies & Enterprises <input type="checkbox"/> Information <input type="checkbox"/> Wholesale Trade <input type="checkbox"/> Accommodation & Food Services <input type="checkbox"/> Agriculture, Forestry, Fishing & Hunting <input type="checkbox"/> Construction <input type="checkbox"/> Public Administration <input type="checkbox"/> Arts, Entertainment & Recreation <input type="checkbox"/> Administrative & Support <input type="checkbox"/> Retail Trade <input type="checkbox"/> Educational Services <input type="checkbox"/> Transportation & Warehousing <input type="checkbox"/> Waste Management & Remediation Services <input type="checkbox"/> Other Services (except Public Administration)								
23. Business Ownership – What percentage of your business is male or female ownership? _____ % Male _____ % Female			24. Month & Year Business Started?		25. Do you conduct business online? <input type="checkbox"/> Yes <input type="checkbox"/> No		26. Are you a home based Business? <input type="checkbox"/> Yes <input type="checkbox"/> No	
							26a. Are you 8(a) certified? <input type="checkbox"/> Yes <input type="checkbox"/> No	
27. Total No. of Employees (full & part time)		28. For your most recent full business year, what were your: Gross Revenues/Sales \$ _____ +Profits/-Losses \$ _____			29. What is the legal entity of your business? <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Corporation <input type="checkbox"/> LLC <input type="checkbox"/> S-Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Other (specify) _____			
30. What is the nature of counseling you are seeking? (Choose primary category) <input type="checkbox"/> Start-up Assistance (How do I start a small business?) <input type="checkbox"/> Human Resources/Managing Employees <input type="checkbox"/> Marketing/Sales (promotion, market research, pricing, etc.) <input type="checkbox"/> Technology/Computers <input type="checkbox"/> Business Plan <input type="checkbox"/> Customer Relations <input type="checkbox"/> Government Contracting (including certifications) <input type="checkbox"/> eCommerce (using the Internet to do business) <input type="checkbox"/> Financing/Capital (such as applying for a loan, building equity capital) <input type="checkbox"/> Business Accounting/Budget <input type="checkbox"/> Franchising <input type="checkbox"/> Legal Issues (such as, Should I incorporate?) <input type="checkbox"/> Managing a Business <input type="checkbox"/> Cash Flow Management <input type="checkbox"/> Buy/Sell Business <input type="checkbox"/> International Trade								
Describe specific assistance requested in the space provided. _____ _____								

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Part III: Counselor Record

31. Client Name (please use the same name from original 641 Part 1) (Last, First, MI)		32. Email	
33. Telephone Primary _____ Secondary _____		34. Fax	
35. Street Address /P.O. Box		36. City	
37. State		38. Zip +4	
39. Is the client currently in business? <input type="checkbox"/> Yes <input type="checkbox"/> No (if no, skip to 44)		40. Month & Year Business Started?	
41. Total No. of Employees (full & PT)		42. As of the most recent counseling date and for the most recent business year, what are the client's annual: Gross Revenues/Sales \$ _____ +Profits/-Losses\$ _____	
43. SBA or Resource Partner Service Contributed to the Following:			
\$ _____ SBA Loan Amount		Certifications	
\$ _____ Non-SBA Loan Amount		<input type="checkbox"/> 8(a)	
\$ _____ Amount of Equity Capital Received		<input type="checkbox"/> Hubzones	
		<input type="checkbox"/> SDB	
		<input type="checkbox"/> Other (specify state, local, etc) _____	
SBA Financial Assistance			
<input type="checkbox"/> Community Express			
<input type="checkbox"/> Micro loan			
<input type="checkbox"/> Other (SBIR, SBIC, 7(a) 504, etc) _____			

COUNSELOR MUST COMPLETE ALL ITEMS IN BORDERED AREA

44. WHAT WAS THE NATURE OF THE COUNSELING YOU PROVIDED THE CLIENT?

(CHOOSE PRIMARY CATEGORY ONLY)

- | | | | |
|--|---|--|--|
| <input type="checkbox"/> Start-up Assistance (How do I start a small business?) | <input type="checkbox"/> Human Resources/Managing Employees | <input type="checkbox"/> Marketing/Sales (promotion, market research, pricing, etc.) | <input type="checkbox"/> Technology/Computers |
| <input type="checkbox"/> Business Plan | <input type="checkbox"/> Customer Relations | <input type="checkbox"/> Government Contracting (including certifications) | <input type="checkbox"/> eCommerce (using the Internet to do business) |
| <input type="checkbox"/> Financing/Capital (such as, applying for a loan, building equity capital) | <input type="checkbox"/> Business Accounting/Budget | <input type="checkbox"/> Franchising | <input type="checkbox"/> Legal Issues (such as, Should I incorporate?) |
| <input type="checkbox"/> Managing a Business | <input type="checkbox"/> Cash Flow Management | <input type="checkbox"/> Buy/Sell Business | <input type="checkbox"/> International Trade |
| | <input type="checkbox"/> Tax Planning | | |

45. TYPE OF SESSION FACE-TO-FACE ONLINE TELEPHONE

46. LANGUAGE USED ENGLISH SPANISH OTHER _____

47. HISTORY NEW CASE FOLLOW-UP

48A. DATE COUNSELED ____ / ____ / ____

48B. STARTING TIME OF COUNSELING SESSION ____ : ____

49. COUNSELOR NAMES _____

50A. HOW LONG WAS THE COUNSELING SESSION? _____ HOUR(S)

50B. TIME SPENT ON PREPARATION FOR THIS CLIENT? _____ HOUR(S)

50C. TIME SPENT TRAVELING BY ALL COUNSELORS? _____ HOUR(S)

51. HOW MANY COUNSELORS PARTICIPATED IN THIS SESSION? _____

52. Counselor's Notes:

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