

# Counseling Information Form

## Alabama Procurement Technical Assistance Center Program

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

<b>3. Client Name</b> (Name of the person completing the form/representative of the business) (Last, First, MI)	<b>4. Email:</b> <b>Website:</b>
<b>5. Telephone</b> Primary _____ Secondary _____	<b>6. Fax</b>
<b>7. Street Address/PO Box</b> (give business address if currently in business) <b>8. City</b>	<b>9. State</b> <b>10. Zip</b> <b>+4</b>

**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  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 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 3<sup>rd</sup> 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.

<b>12. Preferred date &amp; time for appointment</b> Date: _____ Time: _____	<b>13. Client Signature</b>	<b>Date:</b>
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### PART II: Client Intake (to be completed by all Clients)

<b>14. Race</b> (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	<b>15. Ethnicity</b> <input type="checkbox"/> Hispanic or Latino <input type="checkbox"/> Not Hispanic or Latino	<b>16. Gender</b> <input type="checkbox"/> Male <input type="checkbox"/> Female	<b>17. Do you consider yourself a person with a disability?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>18. Veteran Status</b> <input type="checkbox"/> Non-Veteran <input type="checkbox"/> Veteran <input type="checkbox"/> Service-Disabled Veteran	<b>18a. Military Status</b> <input type="checkbox"/> Member of Reserve or National Guard <input type="checkbox"/> On Active Duty		
<b>19. What prompted you to contact us?</b> (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) _____			
<b>20. Are you currently in business?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No (if no, skip to 30)	<b>21. Name of Company</b>		
<b>22. Type of Business</b> (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)			
<b>23. Business Ownership</b> – What percentage of your business is male or female ownership? _____ % Male _____ % Female	<b>24. Month &amp; Year Business Started?</b>	<b>25. Do you conduct business online?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>26. Are you a home based Business?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>26a. Are you 8(a) certified?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No			
<b>27. Total No. of Employees</b> (full & part time)	<b>28. For your most recent full business year, what were your:</b> Gross Revenues/Sales \$ _____ +Profits/-Losses \$ _____ Export Sales \$ _____	<b>29. What is the legal entity of your business?</b> <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) _____	
<b>30. What is the nature of counseling you are seeking?</b> (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 checked="" type="checkbox"/> <b>Government Contracting (including certifications)</b> <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. _____ _____ _____			

**FAX BACK TO 205-348-6974**