



Client Intake Form
Texas South-West Network
Small Business Development Centers



Contact Name, Mailing Address, Work Phone, Cell Phone, Race, Ethnicity, Gender, Do you consider yourself a person with a disability?, Military/Veteran Status, How did you hear about us?, What area(s) of business would you like to explore with your SBDC Business Advisor?, Are you currently in business?, Company Name, Street, City, State, Zip, Type of Business, Description, Business Ownership, Do you conduct business online?, Is this a home-based business?, Are you 8(a) certified?, SBA Relationship, Total # Employees, For your most recent full business year, what were your Gross Revenues (Sales)?, What is the legal entity of your business?, What is your position?, Are you currently exporting?, Countries, How many employees are engaged in the exporting aspect of business?, Subset of sales related to exporting?, Client Signature, Date, For Internal Use - Primary Advisor, Client ID, Initial Client Session Type.