



Business Development Client Intake Form

Complete this form so PAffairs can understand your business and recommend next steps. Please print clearly. Leave any item blank if it does not apply.

For your security, do not write Social Security numbers, full account numbers, passwords, or payment card information on this form.

Client Contact Information

Date _____

Preferred name _____

Legal name _____

Pronouns optional _____

Email _____

Phone _____

Mailing address _____

City _____

State and ZIP _____

Preferred contact method ☐ Phone ☐ Email ☐ Text

Business Profile

Business or organization name _____

DBA if different _____

Website or social page _____

City and state of operation _____

Year started _____

Business stage ☐ Idea ☐ Prelaunch ☐ Operating ☐ Restructuring

Organization type ☐ Sole proprietor ☐ LLC ☐ Corporation ☐ Nonprofit ☐ Other _____

Industry and what you sell or provide _____

Do you currently have:

☐ Registered business entity ☐ EIN

☐ Business license if needed ☐ Business bank account

☐ Business plan ☐ Website or professional page

Services You Want to Discuss

☐ Startup or entity formation ☐ Nonprofit development

☐ Registered agent support ☐ Business planning and strategy

☐ Administrative systems ☐ Website and professional presence

☐ Grant or funding readiness ☐ Business credit development

☐ Board governance ☐ Cohort or program development

Other service or immediate question _____

Live Scan and notary services are coming soon and are not yet available for scheduling.

Business Registration and Accounts

Business Registration and Identifiers

Leave an identifier blank if it has not been assigned to your business.

Corporation number _____

Filing date _____

Operating start date _____

D&B or DUNS number _____

CAGE code _____

UEI number _____

WebVEN number _____

SAM.gov number _____

Current Business Accounts

List accounts your business already uses, including banking, vendor or trade, business credit, merchant processing, and financing. Do not write account numbers, balances, or login information.

Provider or institution	Account type	Year opened	Status

Account type examples: business checking, vendor or trade account, business credit card, line of credit, loan, merchant processor.
Status examples: active, closed, pending.

Business Goals and Credit Readiness

Business Credit and Funding Readiness

Which of these are current priorities?

- ☐ Separate personal and business finances ☐ Build vendor or trade history
☐ Understand existing business credit ☐ Organize business documents
☐ Explore funding options ☐ Improve financial systems

Have you reviewed your business credit reports? ☐ Yes ☐ No ☐ Unsure

Are any business account payments currently past due? ☐ Yes ☐ No ☐ Prefer to discuss

Goals and Challenges

What are your top two goals for the next 6 to 12 months?

What is the biggest barrier you want help addressing?

When would you like to begin? ☐ As soon as possible ☐ Within 30 days ☐ In 1 to 3 months ☐ Exploring

Planning and Follow Up

Use this page to record the next steps agreed on during intake. PAffairs staff may complete the planning section with the client.

Client Notes

What would a successful working relationship with PAffairs help you accomplish?

Anything else we should know about your business or preferred way of working?

Contact Permission

☐ I give PAffairs permission to contact me by phone, email, or text about this inquiry and related services. I understand that this intake form does not enroll me in a paid service or authorize a credit application.

Client signature _____

Date _____

For PAffairs Staff

Intake completed by _____

Intake date _____

Primary service area ☐ Startup ☐ Operations ☐ Credit ☐ Funding readiness ☐ Nonprofit ☐ Other

Recommended next steps and documents to request:

Follow up owner _____

Target follow up date _____

Referral or partner introduction discussed, if any:

Share client details with any third party only after obtaining the separate permission required for that referral.

Additional Notes

Client or business name _____ Date _____

[illegible]