



**Financial Services, Inc.**

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## **New Client & Consulting Intake Form**

**Name of Project, Company or Organization:** \_\_\_\_\_

**First Name:** \_\_\_\_\_ **Last Name:** \_\_\_\_\_

**Telephone:** \_\_\_\_\_ **Email Address:** \_\_\_\_\_

**Mailing Address:** \_\_\_\_\_

**Is there more than one owner? If yes, please provide the name, contact information, and title of the company.**

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**Is your company registered?  No  Yes. If yes is it a DBA, LLC, INC or NP?**

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**Do your company have EIN (Employee Identification Number)?  No  Yes,**

**If yes EIN: \_\_\_\_\_ If no I will ask for your social security number to apply for the EIN. If ok list it here \_\_\_\_\_ .**

**What are 1-3 key things you need help with?**

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**What is the vision for your organization, company, or project?**

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**How do you see me helping you?**

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**Will you need a Copyright, Trademark or Patent? If yes, advised when it was first used in commerce and used in public forum.**

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**Do you have a website or online content, blogs, books, etc.? If yes, please list.**

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**Do you have any social media accounts? If so, please list the username and site.**

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**In what ways are you thriving or marketing yourself?**

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**In what ways do you want to grow or change?**

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