

# SIMPLE CLIENT INTAKE FORM TEMPLATE



DATE

TENDING ASSOCIATE

CLIENT NAME

CLIENT COMPANY

PROJECT/REQUEST OVERVIEW

CLIENT ONBOARD INFORMATION

HOME PHONE	<input type="text"/>
CELL PHONE	<input type="text"/>
OTHER PHONE	<input type="text"/>

HOME ADDRESS	<input type="text"/>
	<input type="text"/>
	<input type="text"/>

POSITION/BUSINESS TITLE	<input type="text"/>
SUPERVISOR	<input type="text"/>
DEPARTMENT	<input type="text"/>

WORK ADDRESS	<input type="text"/>
	<input type="text"/>
	<input type="text"/>

DATE OF BIRTH

MALE/FEMALE

IS THIS A PREVIOUS CUSTOMER?

REFERRED BY?

DESCRIBE PREVIOUS WORK/COMMENTS