**SIMPLE CLIENT INTAKE FORM TEMPLATE**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **DATE** |  |  | **TENDING ASSOCIATE** |  |
|   |  |   |
| **CLIENT NAME** |  |  | **CLIENT COMPANY** |  |
|   |  |   |
| PROJECT/REQUEST OVERVIEW |
|   |
|  |  |  |  |  |
| CLIENT ONBOARD INFORMATION |
| **HOME PHONE** |   |  |  |   |
| **CELL PHONE** |   |  | **HOME ADDRESS** |   |
| **OTHER PHONE** |   |  |  |   |
|  |  |  |  |  |
| **POSITION/BUSINESS TITLE** |   |  |  |   |
| **SUPERVISOR** |   |  | **WORK ADDRESS** |   |
| **DEPARTMENT** |   |  |  |   |
|  |  |  |  |  |
| **DATE OF BIRTH** |  |  | **MALE/FEMALE** |  |
|   |  |   |
| **IS THIS A PREVIOUS CUSTOMER?** |  | **REFERRED BY?** |  |
|   |  |   |
|  |  |  |  |  |
| DESCRIBE PREVIOUS WORK/COMMENTS |
|  |