**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 | | | | |
|  | | | | |