

Tell Us More About the Business or Business Idea You Have Come Here for Assistance With:

Size of The Business:

- Disadvantaged Small
- Woman-Owned Small
- Disadvantaged SBA Small
- Minority Owned Small
- Other Small
- Large

Form of The Business:

- Individual (Sole Proprietorship)
- Partnership
- Corporation
- Subchapter S Corporation
- Limited Liability Company
- Non-Profit Organization

Type of Business:

- Not In Business Yet
- Service
- Retail
- Wholesale
- Manufacturer
- Construction
- Surplus Dealer
- Research and Development

Have You Ever Applied for an SBA Loan Before?:

Yes - Program Name: _____

No

Have You Ever Worked with an SBDC Before?:

Yes - Center Name: _____

No

Have You Received an SBA Loan in The Past?:

Yes - Amount: \$ _____

No

Have You Ever Worked With The Wilkes SBDC Before?:

Yes - Approximately When? _____

No

If you already have a existing business, please answer the following questions:

On What Date Did the Business Start?: Month: _____ Year: _____

Please indicate the number of: Full-time Employees (Yourself Included): _____

Part-time Employees (Yourself Included): _____

What are Your Average Annual Gross Sales?: \$ _____

How did You Hear about the Wilkes University SBDC?:

- Advertising/Marketing
- Internet/Web Page
- Local Economic Development Agency
- Client Word of Mouth
- Yellow Pages
- College/University
- PTA Program
- Bank
- Other SBDC
- Television
- Radio
- Government Financing Program
- Chamber of Commerce
- Newspapers
- Senator or Representative
- OVR
- SBA
- Seminar
- Other

Can You Provide the Name of the Person Who Referred You?: _____

What Type of Assistance are You Seeking Today from the SBDC?:

Please read the following statement, then sign and date the form:

I request management assistance from the Small Business Administration and/or the Wilkes University Small Business Development Center. I understand this assistance is free of charge. I agree to cooperate should I be selected to participate in surveys designed to evaluate SBA/SBDC assistance services. I authorize the SBA/SBDC to furnish information to the assigned management counselor although I expect that information to be held in strict confidence by the counselor.

I further understand that any counselor has agreed: (1) not to recommend goods or services from sources in which the counselor has an interest, and (2) will not accept fees or commissions developing from this counseling relationship.

In consideration of SBA/SBDC furnishing management or technical assistance, I waive all claims against SBA/SBDC personnel or counselors arising from this assistance.

Signature: _____ **Date:** _____

Are there Partners? If they are present – please have them read the same statement above and sign:

Signature: _____ **Date:** _____

Signature: _____ **Date:** _____

Please complete the other side of this form as well

SBDC Client Rights and Responsibilities

You have the right to expect:

1. Consulting Assistance Provided at No Charge

Because funding from the U.S. Small Business Administration, the Pennsylvania Department of Community Economic Development, Wilkes University and other funding organizations supports the SBDC program, consulting is provided at no charge to you. Fees may apply for training programs, special services (such as research), materials, and publications.

2. Confidentiality of Information Provided

All SBDC representatives agree to abide by the Pennsylvania SBDC's Standards of Professional Ethics and Conflict of Interest Policy. Information you provide will be held in strictest confidence and will not be released to any parties outside of the Pennsylvania SBDC network. Information on you will not be sold or provided to other organizations. Specific information on you and the nature of your engagement with the SBDC will not be released without your consent. No information you provide will be used to the commercial advantage of any SBDC representative or to the advantage of a third party.

Exceptions:

- Information about the SBDC's service delivery is reported in aggregate to its funding partners and the general public. Specific information about you will not be released without your consent.
- The SBDC will collect and report in aggregate to its funding partners and the general public information on you such as demographic statistics; size, location, age and industry of your business; the general nature of your engagement with the SBDC; and impact statistics such as financing obtained, sales increased or jobs created.
- If you were referred to the SBDC, the SBDC will notify the referrer that you have sought assistance from the SBDC. The SBDC, however, will not disclose in detail the nature of the assistance you are requesting.

3. Unbiased Recommendations

SBDC representatives will not knowingly recommend the purchase of goods or services from any individual or firm with which any SBDC representative has a financial, familial or personal interest.

4. Non-Disclosure of Trade Secrets

Sensitive trade secrets pertaining to unique facts of your business will not be used to benefit another client of the SBDC or any SBDC representative. You understand that sensitive trade secret information is information that is not obvious, that is unknown, or that is unique and pertains to new inventions, secret manufacturing and processing procedures or formulas, or any new innovative process. You understand that it is your responsibility to inform the SBDC of any such sensitive trade secrets both verbally and in writing.

5. Assistance, Guidance, Recommendations and Education

The SBDC program is an educational program. The SBDC will work with you on your specific issues to help build your management skills and knowledge. It is your responsibility to accept and implement recommendations. The SBDC will not:

- negotiate on your behalf
- write your business plan
- act as an employee of your business

As an SBDC client you are responsible for:

1. Participating in Surveys

Because this program cares about the quality of services provided, and because it is primarily funded with public support, the SBDC undertakes a number of initiatives to ascertain the quality and impact of services provided to you. Your candid feedback is critical to the long-term success of this program.

2. Accepting Responsibility and Waiving all Claims

In recognition that you are ultimately responsible for the success or failure of your business and that all decisions pertaining to implementing plans and operating your business are solely your responsibility, you hereby waive any claims of damages against the Wilkes University SBDC and the Pennsylvania SBDC program, Wilkes University, the US Small Business Administration, and the Pennsylvania Department of Community and Economic Development, based on any advice or information provided by the S.B.D.C.

I have read and understand the above stated terms and conditions.

Print Name and Title

Signature

Date