

Client Intake Form

Welcome — and congratulations on taking this step. This form helps us build a presence that's unmistakably you. Answer what you can; we'll fill any gaps together on our call. There are no wrong answers here.

YOUR DETAILS

Full name

Preferred name

Business name (if any)

Email

Phone

City / area

Best way to reach you

☐ Phone ☐ Text ☐ Email

ABOUT YOU & YOUR WORK

What do you do? (title or profession)

Who do you serve? (your ideal client)

Years in your field

License / credentials (e.g., NMLS #)

In your own words, what makes you different from others who do what you do?

Key wins or numbers worth featuring (e.g., "\$90M funded · 500+ clients · Top 1% 2024")

YOUR GOALS

What's prompting this? (check all that apply)

- ☐ New chapter / job change ☐ More referrals
☐ Going out on my own ☐ Rebrand or refresh
☐ Need to look credible online ☐ Building authority

What does success look like 6 months from now?

YOUR CURRENT PRESENCE

Do you have a website?

- ☐ Yes ☐ No

If yes, website URL

Do you own your domain name?

- ☐ Yes ☐ No ☐ Not sure

Domain name (owned or wanted)

LinkedIn URL

Other profiles or links (Instagram, Facebook, Zillow, reviews, etc.)

When you Google your own name today, what comes up? (Be honest — the starting line, not a judgment.)

PACKAGE & SCOPE

Which package fits where you are?

- ☐ Polished (Be Found) ☐ Signature (Be Trusted)
- ☐ Authoritative (Be Remembered) ☐ Not sure yet

Add-ons you're curious about

- ☐ Social posts ☐ Articles
- ☐ Book ☐ Ongoing Care plan

Target launch date (if any)

How did you hear about us?

LOOK & FEEL

Three words for how you want to come across

Colors you love

Colors to avoid

Websites or brands you admire (paste links or names)

Which do you already have?

- ☐ Logo ☐ Professional headshot ☐ Brand colors / fonts
- ☐ Written bio ☐ Testimonials

Notes on your assets (what you have, what you need help with)

ANYTHING ELSE

The one thing you most want people to think when they find you:

Anything else we should know before we start?