

## **Client Intake Form**

Name (PRINT Clearly):			
Company/Organization:			
Address:			
City:	Province:	Postal Code:	
Home #:	_ Work #:	Cell #:	
E-mail Address:			

Please provide a brief description of your products/service:

What stage is your business?

- □ Thought/Idea
- □ Start-Up
- Growth
- □ Mature
- Retired

How long has you owned and operated this business?

- 0 (new business in concept or Start-Up phase)
- □ 0-2 (Start-Up)
- □ 2-5 (Growth)
- □ More than 5 years? \_\_\_\_\_ Yrs

What type of business do you run?

- □ Sole proprietor
- □ Partnership
- Corporation
- Other: \_\_\_\_\_\_

"Building skills, knowledge, networks for female entrepreneurs in the Shuswap."



What are the most significant challenges do you face as a female entrepreneur in the Shuswap?

- Networking/Mentorship
- Marketing
- □ Finance and Accounting
- Human Resource Management
- Funding/Access to Capital
- Product or Service Development
- Other: (please specify) \_\_\_\_\_

What is the most pressing or urgent need you are facing as female entrepreneur in the Shuswap?

Do you have any other comments and/or concerns?

- Would you like to be added to our email list for future events & updates?YES or NO
- How did you hear about this project?
- What is your availability schedule?: Mon Tues Wed Thurs Fri TIME: \_\_\_\_\_ Preference: AM PM

\*\*Please send completed intake form to <a href="mailto:shuswapmentor@gmail.com">shuswapmentor@gmail.com</a>

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## For more information: www.tsutsweye.ca

- To make an appointment with a Consultant/Mentor: Caroline Grover, Entrepreneur in Residence <u>shuswapmentor@gmail.com</u>, 250-300-4757
- For general program questions: Carmen Massey, Project Manager <u>cmassey@tsutsweye.ca</u>, 250-804-3466
- For Indigenous, Diversity or Accessibility inquiries: Julie John, Diversity Coordinator <u>jjohn@tsutsweye.ca</u>, 250-879-1087

<sup>&</sup>quot;Building skills, knowledge, networks for female entrepreneurs in the Shuswap."