

New Client Profile



CLIENT INFORMATION

CLIENT NAME _____
COMPANY NAME _____
ADDRESS _____
CITY/STATE/ZIP _____
PHONE DAY _____
EVE _____
CELL _____
FAX _____
WEBSITE URL _____
TAX ID # _____
501(C)3 STATUS _____

BRIEF DESCRIPTION OF BUSINESS

SOCIAL NETWORKING (CHECK ALL THAT APPLY; INCLUDE CONTACT INFO)

YAHOO IM _____
 TWITTER _____
 FACEBOOK _____
 LINKEDIN _____
 MYSPACE _____
 GOOGLE CHAT _____
 OTHER _____
 OTHER _____

HOW DID YOU HEAR ABOUT MY SERVICES? (CHECK ONE)

INTERNET SEARCH FACEBOOK
 DIRECT EMAIL TWITTER
 FLYER/BUSINESS CARD VANETWORKING
 WTUF 106.3 LOCAL PRESS RELEASE
 REFERRED BY: _____
 OTHER _____

I NEED SERVICES BECAUSE (CHECK ALL THAT APPLY)

I WORK OUT OF MY HOME I TRAVEL A LOT
 MY STAFF IS OVERWHELMED ONE TIME PROJECT
 OTHER _____

I NEED ASSISTANCE WITH (CHECK ALL THAT APPLY)

NEWSLETTERS PROOFREADING
 TRAVEL ARRANGEMENTS INTERNET RESEARCH
 DATA ENTRY EXCEL SPREADSHEETS
 GENERAL CORRESPONDENCE BROCHURES/FLYERS
 SORT/RESPOND TO EMAILS MANUALS/HANDBOOKS
 OTHER _____

PAYPAL INFORMATION (PAYMENTS ONLY ACCEPTED THROUGH PAYPAL)

I CURRENTLY HAVE A PAYPAL ACCOUNT
 I DON'T HAVE A PAYPAL ACCOUNT BUT PLAN TO SETUP ONE
 I DON'T HAVE A PAYPAL ACCOUNT, WILL PAY WITH EMAIL

ADDITIONAL COMMENTS

ADMINISTRATIVE USE ONLY

DATE SET UP _____
 ACCOUNT NUMBER _____
 INITIAL PLAN _____
 DISCOUNTS TO APPLY _____