REQUEST FOR CONSULTING

Company Name: (If applicable)  
Client Name:  
(Last, First, M.I.)

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<thead>
<tr>
<th>Telephone:</th>
<th>Fax:</th>
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<tbody>
<tr>
<td>Primary</td>
<td>Secondary/Cell</td>
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<tr>
<td>Street:</td>
<td>City:</td>
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<td>State:</td>
<td>Zip:</td>
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<td>4#:</td>
<td>County:</td>
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<tr>
<td>Website:</td>
<td>Email:</td>
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Race: (mark one or more)  
- Asian  - White  - African American or Black  - American Indian or Alaska Native  - Native Hawaiian or other Pacific Islander

Ethnicity:  
- Hispanic or Latino  - Not Hispanic or Latino

Gender:  
- Male  - Female

Military Status:  
- Member of the Reserve or National Guard  - On Active Duty

Veteran Status:  
- Non-Veteran  - Veteran  - Service-Disability Veteran

How did you hear about our services? (Mark all that apply)  
- SBA District Office  - SBA Website  - Business Owner  - Business Owner  - Television/Radio  - USEAC

Type of Business: (Choose Primary Category)  

What is the legal entity of your business?  
- Sole proprietorship  - C-Corp  - Partnership  - S-Corp  - LLC  - Other

Business Status:  
- Full Time  - Part Time
NAICS Code _________

Total No. of Employees:
- Full Time _________
- Part Time _________

Consulting requested for:
- Starting a Business  - Purchasing a Business

For most recent full business year:
Gross Revenue/Sales:
- $___________
- +Profits/ -Losses
$___________

What is the nature of the counseling you are seeking? (Select all that apply)  
- Start-Up Assistance (How do I start a small business?)  - Government Contracting (including Certifications)  - Legal Issues (such as, should I incorporate?)  - Business Accounting/Budget  - Environmental Management  - Tax Planning  - Human Resources/Managing Employees  - Marketing/Sales (promotion, market research, pricing, etc.)  - Financing/Capital (applying for a loan, building equity capital)  - eCommerce (using the internet to do business)  - New Product Development  - Cash Flow Management  - Technology/Computers  - Managing a Business  - Other (specify) _________

Business Ownership – What percentage of your business is male or female owned?  
- % Male  - % Female

Month & Year Business started?  

Do you conduct business online?  
- Yes  - No

Is this a home-based business?  
- Yes  - No

Are recent financial statements available for your business?  
- Yes  - No

Do you have a written business plan?  
- Yes  - No

Are you 8(a) certified?  
- Yes  - No
SBDC Client Rights and Responsibilities

As an SBDC Client, you have the right to expect:

Consulting Assistance Provided at No Charge – Because the SBDC program is supported by the funding from the U.S. Small Business Administration, the Pennsylvania Department of Community and Economic Development, Duquesne University and other funders, consulting is provided at no charge to you. Fees may apply for training programs, special services (such as, research), materials, and publications. You will be notified of any fee in advance.

Confidentiality of Information is 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 the strictest confidence and will not be released to any parties outside of the Pennsylvania SBDC network 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 funders 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 funders and the general public, information about 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, increased sales or jobs created.
- If you were referred to the SBDC, the SBDC may 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 unless you provide consent to do so.
- Information will be shared with the Pennsylvania Partnerships for Regional Economic Performance (PREP) if you consent below.

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.

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. Sensitive trade secret information is information which is not obvious, which is unknown, or which 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.

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:

1. Negotiate on your behalf
2. Write your business plan
3. Act as an employee of your business

As an SBDC client you are responsible for:

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. You will be asked to participate in an annual client questionnaire sent at/near the end of the calendar year. Your consultant will provide you with a copy of the client questionnaire upon request.

Informing Legislators About the Service – Consulting services are provided at no charge to you because of the financial support of the federal government and the Commonwealth of Pennsylvania. To ensure the SBDC program will be available to others, we may ask you to write to your legislators to let them know about your experience with the program.

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 your claims of damages against Duquesne University SBDC, the Pennsylvania SBDC program, any Universities hosting a Pennsylvania SBDC program, Duquesne University, the U.S. Small Business Administration, and the Pennsylvania Department of Community and Economic Development, or any other entity that provides funding to the Pennsylvania SBDC program, based on any advice or information provided by the SBDC.

SBDC services are not available to individuals or entities that have been debarred or suspended by the federal government. By agreeing to receive assistance from the SBDC you are self-certifying that you are not currently federally debarred or suspended and also agree to cease using SBDC services if you become federally debarred or suspended in the future.

Reporting of Data to Pennsylvania Partnerships for Regional Economic Performance (PREP):

Per Federal law (15 USC 648(a)(7)), the Pennsylvania Small Business Development Centers maintain strict confidentiality of client data. The only condition under which a Small Business Development Center can share client information with other organizations is if the client provides explicit written permission to do so. Because:

- the Pennsylvania Department of Community and Economic Development (DCED), who provides significant funding to the SBDC program through the Partnerships for Regional Economic Performance (PREP), which enables consulting services to be provided to you at no-fee, is interested in knowing specific information on SBDC clients served; and
- there are economic development and growth programs outside of the SBDC from which you as a client may benefit;

therefore, you permit the release of your name, contact information, company name, business type/NAICS code, demographic information (minority, woman and/or veteran owned status), company start date, tenure of company owner, and type of assistance provided to the Pennsylvania DCED and member organizations in the PREP program. This information will be entered into the PREP database called Executive Pulse. By agreeing to allow the information outlined above to be entered into Executive Pulse you waive all rights to the Privacy Protection of SBDC data as noted in 15 USC 648(a)(7), and waive all claims against the SBA, the University of Pennsylvania and the [X] University for any harm or damages resulting from sharing this information.

You have my permission to release my name, contact information, company name, business type/NAICS code, demographic information (minority, woman and/or veteran owned status), company start date, tenure of company owner, and type of assistance provided to the Pennsylvania DCED, member organizations in the PREP program and other authorized users of the Executive Pulse database:

☐ Yes  ☐ No

(Your response does not impact access to SBDC services.)

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Print Name __________________________ Signature __________________________ Date _____________

Date Received ______________________ Outreach __________________________ Contact Dates __________________________

Date Assigned _____________________ Consultant __________________________
<table>
<thead>
<tr>
<th>Country of Interest: _________________________________</th>
<th>For most recent full business year:</th>
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<tbody>
<tr>
<td></td>
<td>Total No. of Employees engaged in exporting FT___________________</td>
</tr>
<tr>
<td></td>
<td>Amount of your Gross sales/revenues related to exporting $_________________ PT___________________</td>
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If your company is currently exporting, please indicate the countries to which your company exports: (Mark all that apply)

### Asia
- Afghanistan
- Bahrain
- Bangladesh
- Belarus
- Bhutan
- Brunei
- Burma
- Cambodia
- China
- East Timor
- Georgia
- Hong Kong
- India
- Indonesia
- Iran
- Iraq
- Israel
- Japan
- Jordan
- Kazakhstan
- Korea, North
- Korea, South
- Kuwait
- Kyrgyzstan
- Laos
- Lebanon
- Macau
- Malaysia
- Maldives
- Micronesia
- Mongolia
- Nepal
- Oman
- Pakistan
- Philippines
- Qatar
- Russia
- Saudi Arabia
- Singapore
- Sri Lanka
- Syria
- Tajikistan
- Taiwan
- Thailand
- Turkey
- Turkmenistan
- United Arab Emirates
- Uzbekistan
- Vietnam
- Yemen

### Africa
- Algeria
- Angola Benin
- Botswana
- Burkina Faso
- Burundi
- Cameroon
- Cape Verde
- Central African Republic
- Chad
- Comoros
- Congo
- Democratic Republic of the Congo
- Côte d’Ivoire
- Djibouti
- Egypt
- Equatorial Guinea
- Eritrea
- Ethiopia
- Gabon
- Gambia
- Ghana
- Guinea
- Guinea-Bissau
- Kenya
- Lesotho
- Liberia
- Libya
- Madagascar
- Malawi
- Mali
- Mauritania
- Mauritius
- Morocco
- Mozambique
- Namibia
- Niger
- Nigeria
- Rwanda
- Sao Tome and Principe
- Senegal
- Seychelles
- Sierra Leone
- Somalia
- South Africa
- Sudan
- Swaziland
- Tanzania
- Togo
- Tunisia
- Uganda
- Zambia
- Zimbabwe

### Central America
- Belize
- Costa Rica
- El Salvador
- Guatemala
- Honduras
- Nicaragua
- Panama

### Caribbean
- Anguilla
- Antigua & Barbuda
- Aruba
- Bahamas
- Barbados
- Virgin Islands (British)
- Cayman Islands
- Cuba
- Dominica
- Dominican Republic
- Grenada
- Haiti
- Jamaica
- Montserrat
- Netherlands Antilles
- St. Kitts and Nevis
- St. Lucia
- St. Vincent and Grenadines
- Trinidad and Tobago

### Europe
- Austria
- Azerbaijan
- Albania
- Armenia
- Belgium
- Bosnia-Herzegovina
- Bulgaria
- Croatia
- Cyprus
- Czech Republic
- Denmark
- Estonia
- Finland
- France
- Germany
- Greece
- Hungary
- Iceland
- Ireland
- Italy
- Latvia
- Liechtenstein
- Lithuania
- Luxembourg
- Macedonia
- Malta
- Moldova
- Monaco
- Montenegro
- Netherlands
- Norway
- Poland
- Portugal
- Romania
- Serbia
- Slovak Republic
- Slovenia
- Spain
- Sweden
- Switzerland
- Turkey
- Ukraine
- United Kingdom
- Vatican City

### South America
- Argentina
- Bolivia
- Brazil
- Chile
- Colombia
- Ecuador
- Guyana
- Paraguay
- Peru
- Suriname
- Uruguay
- Venezuela

### Oceania
- Australia
- New Zealand
- Cook Islands
- Fiji
- Kiribati
- Marshall Islands
- Nauru
- Palau
- Papua New Guinea
- Samoa
- Solomon Islands
- Tonga
- Tuvalu
- Vanuatu

### Other
- Subcontractor for exporter
- Sell to fill-freight