

**Business Client Form**

**Business Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**# of Years in Business: \_\_\_\_\_\_\_\_\_\_\_\_ Brief Description of Business or Services:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**COBID Certified?: Yes\_\_\_ No\_\_\_ COBID Certification #:\_\_\_\_\_\_\_\_\_\_\_**

**DBE \_\_\_\_\_\_\_ WBE\_\_\_\_\_\_\_\_\_ MBE\_\_\_\_\_\_\_\_\_ ESB\_\_\_\_\_\_\_\_\_ SDV \_\_\_\_\_\_\_**

**(Please Circle): Union or Non-Union**

**If Union, what union are you signatory to?: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**If Non-Union, what programs are you affiliated with? (i.e. NW College of Construction, JATC etc.):**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Are you a Registered Training Agent? (to meet project/CBA/Agency/workforce requirements) Yes\_\_\_ No\_\_\_**

**Primary Contact Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Pronouns: She /He / They**

**Immigrant \_\_\_\_\_ Refugee \_\_\_\_\_**

**Role in Business: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Street Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_\_\_\_\_**

**Website \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Name of Bank/Credit Union: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Name of Alternative lender if applicable (E.g. MESO, Craft 3, Mercy Corps): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Law Firm:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Accounting/Bookkeeping Firm Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Insurance Provider: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Are you currently able to bond?: Yes\_\_\_ No\_\_\_ Bond Capacity: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Do you have any of the following in house staff:**

* **Human Resources Personnel Yes\_\_\_\_ No \_\_\_\_**
* **Project Manager Yes \_\_\_\_ No \_\_\_\_\_\_**
* **Office Manager Yes\_\_\_\_ No \_\_\_\_\_\_**

**Business Life-Cycle Stage, please circle the best option:**

**Start-Up (0-2 years) Growth (2-5 years) Mature (5-10 years) Established (10-50 years)**

**Ownership Type, please circle the best option:**

* **Corporation**
* **Limited Liability Company (LLC)**
* **Partnership**
* **Sole Proprietorship**

**Have you filed your taxes in the last 3 years? Yes \_\_\_\_ No\_\_\_\_\_**

**Annual Sales Range (M represents millions): (0 - $100K) \_\_\_\_\_\_ ($100K - $500K) \_\_\_\_\_\_\_**

**($500K - $1M)\_\_\_\_\_\_ ($1M - $5M)\_\_\_\_\_\_ ($5M - $10M)\_\_\_\_\_\_ ( Over $10M)\_\_\_\_\_\_**

**Have you reported a profit in the last 2 years? Yes \_\_\_\_ No\_\_\_\_ I don’t know \_\_\_\_\_\_**

**Number of Employees: (<10)\_\_\_\_ (10-25)\_\_\_\_ (25-50)\_\_\_\_\_ (50-150)\_\_\_\_ (150-300)\_\_\_\_ (>300)\_\_\_\_**

**List Top 5 Largest Contracts to Date:**

* **Project Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ $ Amount: \_\_\_\_\_\_\_\_\_\_ Prime Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Public/Private \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Project Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ $ Amount: \_\_\_\_\_\_\_\_\_\_ Prime Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Public/Private \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Project Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ $ Amount: \_\_\_\_\_\_\_\_\_\_ Prime Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Public/Private \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Project Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ $ Amount: \_\_\_\_\_\_\_\_\_\_ Prime Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Public/Private \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Project Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ $ Amount: \_\_\_\_\_\_\_\_\_\_\_Prime Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Public/Private \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**List Top 5 Business Goals/ Priorities:**

1. **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
2. **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
3. **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
4. **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
5. **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Have you worked with General contractors or Prime Contractors?: Yes\_\_\_ No\_\_\_**

**Please list top 3 GC/Prime contractors that you enjoy working with, please list in order of preference:**

1. **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
2. **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
3. **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Have you worked with Public Agencies?: Yes\_\_\_ No\_\_\_**

**Please list top 3 public agencies that you enjoy working with, please list in order of preference:**

**1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**What are the reasons why you like working with the Top agency listed above? Put an X beside all that applies:**

* **Prompt pay clause is enforced \_\_\_\_\_\_\_\_**
* **Easy to understand contracts \_\_\_\_\_\_\_\_\_**
* **Helpful Project manager\_\_\_\_\_\_\_\_**
* **Easy to bid projects\_\_\_\_\_\_\_\_**
* **Good technical assistance provider\_\_\_\_\_\_\_\_**

**What is your least favorite public agency to work with and why?**

**Why did you join PBDG?: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Does your business have or provide any of the following:**

**Certified Payroll?: Yes\_\_\_\_ No\_\_\_\_ Business Credit Card?: Yes\_\_\_ No\_\_\_\_ Line of Credit? Yes\_\_\_\_ No\_\_\_\_**

**If you have a line of credit, what is the line amount: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Provided by:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Do you have an additional line of credit? Yes\_\_\_\_ No \_\_\_\_ Provided by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Do you own you work building/office/shop?: Yes\_\_\_\_\_ No\_\_\_\_\_ Lender: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Do You have Equipment Loans? Yes\_\_\_ No\_\_\_\_ If yes, provided by who?: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Please list the major equipment that you have available: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Do you have enough equipment to support a 20% growth in business? Yes \_\_\_\_ No\_\_\_\_\_**

**Employee Benefits?: Yes\_\_\_\_\_ No\_\_\_\_\_ Workers Comp?: Yes\_\_\_\_\_ No\_\_\_\_\_**

**Do you pay over $2,500 annually in worker’s Comp? Yes \_\_\_\_\_ No \_\_\_\_\_\_**

**Are you a SAIF policy holder? Yes\_\_\_\_\_\_ No\_\_\_\_\_\_**

**Do you have the following personally?:**

* **401k/retirement assets/investment accounts Yes\_\_\_\_ No\_\_\_\_**
* **Personal credit card (separate from business credit card) Yes \_\_\_\_ No\_\_\_\_**
* **Personal Residence Yes \_\_\_\_ No \_\_\_\_\_\_**
* **Second home/Investment property Yes\_\_\_\_ No \_\_\_\_\_**
* **Which one of these would you like to hear more about? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Do you know any businesses that would benefit from joining PBDG? Please List: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Business References (please list 3 and include their contact information):**

**1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Business and/or Personal Certifications (e.g. Oregon Contractor Landscape Board, Bachelors in civil engineering):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**NAICS Codes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Please check all the construction divisions that apply to your firm:**

**☐ Division 1 — General Requirement**

**☐ Division 2 — Site Construction**

**☐ Division 3 — Concrete**

**☐ Division 4 — Masonry**

**☐ Division 5 — Metals**

**☐ Division 6 — Wood and Plastics**

**☐ Division 7 — Thermal and Moisture Protection**

**☐ Division 8 — Doors and Windows**

**☐ Division 9 — Finishes**

**☐ Division 10 — Specialties**

**☐ Division 11 — Equipment**

**☐ Division 12 — Furnishings**

**☐ Division 13 — Special Construction**

**☐ Division 14 — Conveying Systems**

**☐ Division 15 — Mechanical/Plumbing**

**☐ Division 16 — Electrical**

**Are you currently enrolled or interested in enrolling in any of the programs listed below:**

* **Port of Portland’s Protegee Program \_\_\_\_\_\_\_\_Enrolled \_\_\_\_\_\_ Interested**
* **Airport Concession Program \_\_\_\_\_\_ Enrolled \_\_\_\_\_\_ Interested**
* **City of Portland’s Prime Contractor Development Program \_\_\_\_\_ Enrolled \_\_\_\_\_Interested**
* **8A Certification Program \_\_\_\_\_\_ Enrolled \_\_\_\_\_Interested**
* **DBE Certification \_\_\_\_\_\_Enrolled \_\_\_\_\_ Interested**
* **JOC Program \_\_\_\_\_\_\_Enrolled \_\_\_\_\_\_ Interested**