



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