The Wilkes University Small Business Development Center
Request for Consulting
Innovation Center, Suite 200 7 South Main Street Wilkes-Barre, PA 18701-1706
Phone: (570) 408-4340 Fax: (570) 408-7889 E-mail: sbdc@wilkes.edu Webpage: www.wilkes.edu/sbdc

Case Number: __________________  NAICS Code: __________________ Application Date: ______/_____/_____

Client  Jobs Act  Wilkes-Barre  Bloomsburg  Ruth C. Hughes  Charles J. Pierce
Contact  Jim Thorpe  Pottsville  Dorothy P. Lane  Edward J. Kowalczyk Jr.
Attended First Step Session  Hazleton  Sullivan County

Please Complete Form Below

Contact Information (Please Print Legibly)

Name of Company (Leave Blank if Name is uncertain): _______________________________________________________

Your Name:  Mrs.  Ms.  Mr.  ______________________________________________________________

Mailing Address: ____________________________________________________________________________________________

City:______________________   State: ________   Zip Code:__________  County:____________________

Please Only List Numbers where it is permissible for us to contact you:

Home Phone: ( )________________________  Work Phone: ( )________________________

Fax: ( )________________________  Cell Phone: ( )________________________

E-mail Address (Please clearly indicate all uppercase and lowercase letter) :

Demographic Information (Please Check All That Apply) :

Ethnic Group:  Gender:  Are You Hispanic?:  Are You Disabled?:  Are you a Veteran or Reservist?:

Black  Male  Yes  Yes  Veteran
White  Female  No  No  Service Disabled Veteran
Asian  Dual Ownership
Native American
Other Ethnic Group

Please Tell Us About Your Business :  Not Open Yet  Open Less than 1 Year  Open More Than 1 Year

Please Provide a Description of the Product / Service You Offer or Will Offer:

______________________________________________________________________________________________
______________________________________________________________________________________________

Check if Applicable:  Is it a Home Based Business  Is it a Franchise  Is it an International Trade Business
**Size of the Business:**
- □ Not in Business Yet
- □ Disadvantaged Small
- □ Woman Owned Small
- □ Disadvantaged SBA Small
- □ Minority Owned Small
- □ Other Small
- □ Large

**Form of the Business:**
- □ Not in Business Yet
- □ Individual (Sole Proprietorship)
- □ Partnership
- □ Corporation
- □ Subchapter S Corporation
- □ Limited Liability Company
- □ Non-Profit Organization

**Type of Business:**
- □ Not in Business Yet
- □ Service
- □ Retail
- □ Wholesale
- □ Manufacturing
- □ Construction
- □ Surplus Dealer
- □ Research and Development

**Have you ever:**

**Applied for an SBA Loan Before?:**
- □ Yes - Program Name:___________________ □ No

**Received an SBA Loan in the Past?**
- □ Yes - Amount: $ ____________________ □ No

**How Did You Hear About The Wilkes University SBDC?:**
- □ Advertising / Marketing
- □ Yellow Pages
- □ Bank
- □ Government Finance Program
- □ OVR
- □ Internet / Web Page
- □ College / University
- □ Other SBDC
- □ Chamber of Commerce
- □ SBA
- □ Local Economic Development Agency
- □ Television
- □ Newspapers
- □ Seminar
- □ Client Word of Mouth
- □ PTA Program
- □ Radio
- □ Senator or Representative
- □ Other

**Could You Provide The Name of the Person That Referred You?:**

**What Type of Assistance are You Seeking From The Wilkes University SBDC?:**

**PREP Client Intake and Referral Policy—Effective January, 2012**

The Pennsylvania Small Business Development Centers maintain strict confidentiality, relative to all matters relating to its clients. The only condition under which a Small Business Development Center (SBDC) can share client information with other organizations is if the client provides explicit written permission to do so. Because there are economic development and growth programs outside of the SBDC from which clients may benefit, and because engaging the services of these other programs in a collaborative and complementary fashion with SBDC services can provide enhanced benefit to our clients, if in the course of your consulting engagement, you and your consultant agree you can benefit from the services provided by our Pennsylvania Department of Community and Economic Development (DCED) funded Partnership for Regional Economic Performance (PREP) partners, the SBDC may release my name, contact information; company name, business type and type of assistance provided to the Pennsylvania DCED and designated member organizations in the PREP program:

□ YES  □ NO
Please read the following, then sign and date the form:

I request management assistance from the Small Business Administration and/or the Wilkes University Small Business Development Center.

**SBDC Client Rights and Responsibilities**

You have the right to expect:

1. **Consulting Assistance Provided at No Charge**
   
   Because funding from the U.S. Small Business Administration, the Pennsylvania Department of Community Economic Development, Wilkes University, and other funding organizations supports the SBDC program, consulting is provided at no charge to you. Fees may apply for training programs, special services (such as research), materials, and publications.

2. **Confidentiality of Information 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. Information on you will not be sold or provided to other organizations. Specific information on you and the nature of your engagement with the SBDC will not be released 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 funding partners 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 funding partners and the general public on 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, sales increased, or jobs created.
   
   * If you were referred to the SBDC, the SBDC will 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.

3. **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.

4. **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. You understand that sensitive trade secret information is information that is not obvious, that is unknown, or that 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.

5. **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:

   * negotiate on your behalf
   * write your business plan
   * act as an employee of your business

   **As an SBDC client you are responsible for:**

1. **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.

2. **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 any claims of damages against the Wilkes University SBDC and the Pennsylvania SBDC program, Wilkes University, the US Small Business Administration, and the Pennsylvania Department of Community and Economic Development, based on any advice or information provided by the SBDC.

I have read and understand the above stated terms and conditions.

Print Name and Title

Signature

Date

SBDC Clients Rights and Responsibilities Rev 2/04