R GLAS CONSULTING

CLIENT NEEDS ASSESSMENT

National 833-770-2170 | Local 317-593-4337

Tell us about your business.

Fill in the shaded fields. Check all services that interest you. Estimates are fine.

Full name

Your title / role

Business / proposed business name

Email address

Phone number

City and state

Website / social media link

Business stage

- ☐ Idea / not yet launched
- ☐ New business (under 1 year)
- ☐ Established business
- ☐ Nonprofit / mission-driven

Industry and what your business does (or plans to do)

What is the most important result you want from our work together?

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Where can we help?

Select the areas you want to discuss. We will confirm scope, pricing, and next steps together.

Business foundation

- [ ] Business planning / strategy
- [ ] LLC / corporation setup support
- [ ] S Corp / C Corp coordination
- [ ] Operations / process improvement

Brand and digital presence

- [ ] Logo / brand identity
- [ ] Website / landing page design
- [ ] Social media design / advertising
- [ ] Marketing / business growth

Funding and government opportunities

- [ ] Business startup funding support
- [ ] Funding readiness / applications
- [ ] Grant research / proposal support
- [ ] Government contracting readiness
- [ ] Capability statement / proposal prep
- [ ] Nonprofit / 501(c)(3) support

Documents and continuity

- [ ] Trust / will coordination
- [ ] Notary service coordination

Other services, details, or questions

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Priorities, timing & next steps.

Share only what is relevant. This is an inquiry, not a funding application or service agreement.

What is your biggest challenge right now?

When would you like to start?

Planned consulting / project budget

If seeking funding: amount needed (estimate)

What would the funding be used for?

How would you prefer we contact you?

☐ Email ☐ Phone call

Best days / times to reach you (include time zone)

Accepted payment methods

Visa | Mastercard | Zelle | Cash App

Payment instructions are provided after project scope and fees are agreed.
Do not enter card numbers, bank details, passwords, or Social Security numbers.

☐ You may contact me about this inquiry using the details I provided.

Setup, nonprofit, trust and will support involves administrative coordination.
Legal, tax and notarial work requires appropriately qualified professionals.
Funding, grants and contracts are subject to eligibility and provider approval; no award is guaranteed.

TO RETURN: Save your completed PDF, then reply to the email that sent you this form.
Downloaded from our website? Call 833-770-2170 for return instructions.