

# SBOC – Intake Form



## 1. Personal Information

First Name

Last Name

Home Address

City, State, Zip

Do you own your home?

Rent Home

Own Home

Other

Date moved to current address

Email

Phone

Date of Birth

Language Preference

Gross annual household income (\$)

Employment Status (Check all that apply)

Employed Full Time

Gender

Male

Employed Part Time (under 35 hours a week)

Female

Self Employed

Undisclosed or Other

Unemployed

What is your race and ethnicity? (Check one or more boxes)

American Indian or Alaska Native

Asian

Black, African American

Hispanic or Latino/a

White

Native Hawaiian or Pacific Islander

Some other race (print race)

Marital Status

Single

Divorced

Separated

Married

Widowed

Domestic Partnership

Do you consider yourself a person with a disability?

Yes

No

Veteran Status

Non-Veteran

Service-Disabled Veteran

Veteran

What is the highest formal level of education you have attained?

Elementary School

Middle School

GED

High School Some

College Associates

Degree

Bachelor's Degree

Graduate Degree

None

How did you hear about RPBA?

Brochure/Flyer	Search Engine	Radio
Community Organization	Social Network	RPBA Staff
Event	Lender/Bank	Word of Mouth/Friend/Family
Government Agency	Newspaper	Other

## 2. Business Information

Name (Person completing this form)

Date

Business Name

Address

City, State, Zip

Do you lease or own your business space?

Lease

Own

Business Phone

Business Mobile

Business Fax

Website

Preferred Contact Method

Phone

Email

Other:

Date business started (first sale made)

Legal Structure

Sole Proprietor

Corporation

Partnership

LLC

LLP

Other

Does your business have a current business license?

Yes

No

Exempt

Business Partners (include ownership percentage)

Description of Business or Idea

## 3. Authorization

The undersigned are applying to Rogers Park Business Alliance (RPBA) for consulting related to acquiring capital for my business. I understand that RPBA staff may obtain and discuss information about my credit history, financial situation, employment or other matters related to this process. I understand that it may be necessary for RPBA staff to discuss my information among themselves as they deem necessary to improve the possibility of my qualifying for capital. I understand that all information will be kept with strict confidentiality and that nothing will be divulged to any person who is not directly involved in the process. I authorize RPBA to share my financial, credit, employment or other information with other non-profit or government agencies or financial institutions as they deem necessary to improve the possibility of my qualifying for capital. I hereby authorize and instruct RPBA to obtain and review my credit report by signing this form and giving you my information. My credit report will be obtained from a credit-reporting agency chosen by RPBA.

Signature

Date