



## Massachusetts Small Business Development Center Network

### *Client Rights and Responsibilities*

This is a request for management and/or technical assistance from the Massachusetts Small Business Development Center Network's regional office, a subcontractor of the University of Massachusetts Amherst, a state University with the Commonwealth of Massachusetts under Chapter 648 of the Acts of 1962, as amended under a cooperative agreement number SBAHQ-17-B-0001 partially funded by the U.S. Small Business Administration and the Massachusetts Office of Business Development.

It is understood that such assistance will be provided to me free of charge and that I incur no obligation to reimburse the MSBDC or its advisor(s) providing such assistance, unless otherwise agreed to by both parties in writing. It is understood that the MSBDC will not authorize release of information given, except when required under applicable federal and state statutes, rules and regulations.

It is understood that release of such information will be made available for purposes of financial audits by the parties mentioned above in paragraph one.

I understand that the advisor(s) providing assistance to me have agreed that they will not:

- Recommend the purchase of goods or services in which he/she has an interest in or represents, and;
- Accept fees or commissions from third parties who have supplied goods or services to me on their recommendations.

The company and/or the MSBDC may terminate this request by giving written notice to the other. In consideration of furnishing you and/or your business with management and technical assistance, you agree to indemnify and hold harmless the University, its trustees, officers, employees, and all other parties mentioned in paragraph one above from any and all claims or liability in connection with this assistance.

In return for assistance, the client agrees to cooperate with the Massachusetts Small Business Development Center by providing information requested in a timely manner for advising purposes. Also, the client agrees to return qualitative data information concerning services rendered within ten (10) days of termination of business assistance and to provide impact data which may be requested, including a one year follow-up.

By contacting the regional office and requesting at least two weeks in advance, every attempt will be made to reasonably accommodate persons with disabilities and those who need translation services. Please contact the regional office where you are seeking services.

**Please complete the following Request for Counseling form, sign and bring it to your first appointment.**

You can type directly on the form from your computer, though you cannot save the file unless you are using the full Adobe Acrobat software (not just Acrobat Reader). All clients are required to sign the Request for Counseling form in order to receive services.



MASSACHUSETTS SMALL BUSINESS DEVELOPMENT CENTER
U.S. Small Business Administration Request for Counseling (SF641)



PLEASE PRINT or TYPE

Contact Information and Business Information (if applicable) section including fields for Lead Customer Name, Position Title, Home Address, Home Telephone, Cell Phone, Email Address, Date of Birth, Business Name, Business Address, Business City, State & Zip (plus 4), Business Telephone, Business Fax, Other Phone (Cell), Website, and Business Description.

The Massachusetts SBDC program cannot provide business advisory services to companies that have been suspended or debarred by a federal agency. I self-certify that neither I nor my company have been suspended or debarred by a federal agency. [initial \_\_\_\_\_]. I request business advisory services from the Small Business Administration (SBA) or an SBA Resource Partner.

Client Signature:

Date:

Race (mark all that apply), Gender, Veteran Status, Military Status, and Ethnicity section with checkboxes for various categories.

Type of Business for which you are seeking assistance or contemplating starting: (choose one best category) section with multiple checkboxes for business types.

Who were you referred by? (mark all that apply) section with checkboxes for various referral sources.

What is the nature of the counseling you are seeking? (mark all that apply) section with checkboxes for various counseling needs.

Describe specific assistance requested:

If you came to the MSBDC seeking financing for a proposed or existing business, please check here. [ ]

Are you currently in business?, Business Ownership, Do you conduct business online?, Total number of employees, Date business started, If yes, are you currently exporting?, Are you a home-based business?, What is the legal entity of your business?, Of the total employees, how many are engaged in the exporting aspect of your business?

For the most recent full business year, what were your... Gross Revenues/Sales \$ + Profits/-Losses \$, Amount of your gross revenues/sales related to exporting? \$, and Certifications section.

**Appendix A**

If your company is currently exporting, please indicate the countries to which your company exports *(mark all that apply)*

| Asia   | Africa   | Caribbean  | Central America  | North America  |
|--|--|--|--|--|
| <input type="checkbox"/> Afghanistan<br><input type="checkbox"/> Bahrain<br><input type="checkbox"/> Bangladesh<br><input type="checkbox"/> Belarus<br><input type="checkbox"/> Bhutan<br><input type="checkbox"/> Brunei<br><input type="checkbox"/> Burma<br><input type="checkbox"/> Cambodia<br><input type="checkbox"/> China<br><input type="checkbox"/> East Timor<br><input type="checkbox"/> Georgia<br><input type="checkbox"/> Hong Kong<br><input type="checkbox"/> India<br><input type="checkbox"/> Indonesia<br><input type="checkbox"/> Iran<br><input type="checkbox"/> Iraq<br><input type="checkbox"/> Israel<br><input type="checkbox"/> Japan<br><input type="checkbox"/> Jordan<br><input type="checkbox"/> Kazakhstan<br><input type="checkbox"/> Korea, North<br><input type="checkbox"/> Korea, South<br><input type="checkbox"/> Kuwait<br><input type="checkbox"/> Kyrgyzstan<br><input type="checkbox"/> Laos<br><input type="checkbox"/> Lebanon<br><input type="checkbox"/> Macau<br><input type="checkbox"/> Malaysia<br><input type="checkbox"/> Maldives<br><input type="checkbox"/> Micronesia<br><input type="checkbox"/> Mongolia<br><input type="checkbox"/> Nepal<br><input type="checkbox"/> Oman<br><input type="checkbox"/> Pakistan<br><input type="checkbox"/> Philippines<br><input type="checkbox"/> Qatar<br><input type="checkbox"/> Russia<br><input type="checkbox"/> Saudi Arabia<br><input type="checkbox"/> Singapore<br><input type="checkbox"/> Sri Lanka<br><input type="checkbox"/> Syria<br><input type="checkbox"/> Tajikistan<br><input type="checkbox"/> Taiwan<br><input type="checkbox"/> Thailand<br><input type="checkbox"/> Turkey<br><input type="checkbox"/> Turkmenistan<br><input type="checkbox"/> United Arab Emirates<br><input type="checkbox"/> Uzbekistan<br><input type="checkbox"/> Vietnam<br><input type="checkbox"/> Yemen | <input type="checkbox"/> Algeria<br><input type="checkbox"/> Angola<br><input type="checkbox"/> Benin<br><input type="checkbox"/> Botswana<br><input type="checkbox"/> Burkina Faso<br><input type="checkbox"/> Burundi<br><input type="checkbox"/> Cameroon<br><input type="checkbox"/> Cape Verde<br><input type="checkbox"/> Central African Republic<br><input type="checkbox"/> Chad<br><input type="checkbox"/> Comoros<br><input type="checkbox"/> Congo<br><input type="checkbox"/> Democratic Republic of Congo<br><input type="checkbox"/> Cote d'Ivoire<br><input type="checkbox"/> Djibouti<br><input type="checkbox"/> Egypt<br><input type="checkbox"/> Equatorial Guinea<br><input type="checkbox"/> Eritrea<br><input type="checkbox"/> Ethiopia<br><input type="checkbox"/> Gabon<br><input type="checkbox"/> Gambia<br><input type="checkbox"/> Ghana<br><input type="checkbox"/> Guinea<br><input type="checkbox"/> Guinea-Bissau<br><input type="checkbox"/> Kenya<br><input type="checkbox"/> Lesotho<br><input type="checkbox"/> Liberia<br><input type="checkbox"/> Libya<br><input type="checkbox"/> Madagascar<br><input type="checkbox"/> Malawi<br><input type="checkbox"/> Mali<br><input type="checkbox"/> Mauritania<br><input type="checkbox"/> Mauritius<br><input type="checkbox"/> Morocco<br><input type="checkbox"/> Mozambique<br><input type="checkbox"/> Namibia<br><input type="checkbox"/> Niger<br><input type="checkbox"/> Nigeria<br><input type="checkbox"/> Rwanda<br><input type="checkbox"/> Sao Tome and Principe<br><input type="checkbox"/> Senegal<br><input type="checkbox"/> Seychelles<br><input type="checkbox"/> Sierra Leone<br><input type="checkbox"/> Somalia<br><input type="checkbox"/> South Africa<br><input type="checkbox"/> Sudan<br><input type="checkbox"/> Swaziland<br><input type="checkbox"/> Tanzania<br><input type="checkbox"/> Togo<br><input type="checkbox"/> Tunisia<br><input type="checkbox"/> Uganda<br><input type="checkbox"/> Zambia<br><input type="checkbox"/> Zimbabwe | <input type="checkbox"/> Anguilla<br><input type="checkbox"/> Antigua & Barbuda<br><input type="checkbox"/> Aruba<br><input type="checkbox"/> Bahamas<br><input type="checkbox"/> Barbados<br><input type="checkbox"/> Virgin Islands (British)<br><input type="checkbox"/> Cayman Islands<br><input type="checkbox"/> Cuba<br><input type="checkbox"/> Dominica<br><input type="checkbox"/> Dominican Republic<br><input type="checkbox"/> Grenada<br><input type="checkbox"/> Haiti<br><input type="checkbox"/> Jamaica<br><input type="checkbox"/> Montserrat<br><input type="checkbox"/> Netherlands Antilles<br><input type="checkbox"/> St. Kitts and Nevis<br><input type="checkbox"/> St. Lucia<br><input type="checkbox"/> St. Vincent and Grenadines<br><input type="checkbox"/> Trinidad and Tobago | <input type="checkbox"/> Belize<br><input type="checkbox"/> Costa Rica<br><input type="checkbox"/> El Salvador<br><input type="checkbox"/> Guatemala<br><input type="checkbox"/> Honduras<br><input type="checkbox"/> Mexico<br><input type="checkbox"/> Nicaragua<br><input type="checkbox"/> Panama  | <input type="checkbox"/> Bermuda<br><input type="checkbox"/> Canada  |
|  |  |  | <b>Europe</b>  | <b>South America</b>   |
|  |  |  | <input type="checkbox"/> Austria<br><input type="checkbox"/> Azerbaijan<br><input type="checkbox"/> Albania<br><input type="checkbox"/> Armenia<br><input type="checkbox"/> Belgium<br><input type="checkbox"/> Bosnia-Herzegovina<br><input type="checkbox"/> Bulgaria<br><input type="checkbox"/> Croatia<br><input type="checkbox"/> Cyprus<br><input type="checkbox"/> Czech Republic<br><input type="checkbox"/> Denmark<br><input type="checkbox"/> Estonia<br><input type="checkbox"/> Finland<br><input type="checkbox"/> France<br><input type="checkbox"/> Germany<br><input type="checkbox"/> Greece<br><input type="checkbox"/> Hungary<br><input type="checkbox"/> Iceland<br><input type="checkbox"/> Ireland<br><input type="checkbox"/> Latvia<br><input type="checkbox"/> Liechtenstein<br><input type="checkbox"/> Lithuania<br><input type="checkbox"/> Luxembourg<br><input type="checkbox"/> Macedonia<br><input type="checkbox"/> Malta<br><input type="checkbox"/> Moldova<br><input type="checkbox"/> Monaco<br><input type="checkbox"/> Montenegro<br><input type="checkbox"/> Netherlands<br><input type="checkbox"/> Norway<br><input type="checkbox"/> Poland<br><input type="checkbox"/> Portugal<br><input type="checkbox"/> Romania<br><input type="checkbox"/> Serbia<br><input type="checkbox"/> Slovak Republic<br><input type="checkbox"/> Slovenia<br><input type="checkbox"/> Spain<br><input type="checkbox"/> Sweden<br><input type="checkbox"/> Switzerland<br><input type="checkbox"/> Turkey<br><input type="checkbox"/> Ukraine<br><input type="checkbox"/> United Kingdom<br><input type="checkbox"/> Vatican City | <input type="checkbox"/> Argentina<br><input type="checkbox"/> Bolivia<br><input type="checkbox"/> Brazil<br><input type="checkbox"/> Chile<br><input type="checkbox"/> Colombia<br><input type="checkbox"/> Ecuador<br><input type="checkbox"/> Guyana<br><input type="checkbox"/> Paraguay<br><input type="checkbox"/> Peru<br><input type="checkbox"/> Suriname<br><input type="checkbox"/> Uruguay<br><input type="checkbox"/> Venezuela   |
|  |  |  |  | <b>Oceania</b>   |
|  |  |  |  | <input type="checkbox"/> Australia<br><input type="checkbox"/> New Zealand<br><input type="checkbox"/> Cook Islands<br><input type="checkbox"/> Fiji<br><input type="checkbox"/> Kiribati<br><input type="checkbox"/> Marshall Islands<br><input type="checkbox"/> Nauru<br><input type="checkbox"/> Palau<br><input type="checkbox"/> Papua New Guinea<br><input type="checkbox"/> Samoa<br><input type="checkbox"/> Solomon Islands<br><input type="checkbox"/> Tonga<br><input type="checkbox"/> Tuvalu<br><input type="checkbox"/> Vanuatu |
|  |  |  |  | <b>Other</b>   |
|  |  |  |  | <input type="checkbox"/> Subcontractor for Exporter<br><input type="checkbox"/> Sell to fill-freight   |