



# Business Advisory Group

(Herein after referred to as "The Group")

<b>Consultation Form</b> Private and Confidential  Date: _____ Req. No.: _____
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## Client Information

BUSINESS NAME: \_\_\_\_\_  
 (Existing or Proposed) \_\_\_\_\_  
 ADDRESS: \_\_\_\_\_  
 \_\_\_\_\_

CLIENT'S NAME: \_\_\_\_\_  
 (Name ALL individuals \_\_\_\_\_  
 representing the Business \_\_\_\_\_  
 if MORE than ONE) \_\_\_\_\_

Telephone \_\_\_\_\_  
 Fax \_\_\_\_\_  
 E-Mail: \_\_\_\_\_

TYPE OF BUSINESS: \_\_\_\_\_  
 (you are in, or propose to launch)

## Record of meetings with "The Group"

First meeting today     Repeat. Date of previous meeting: \_\_\_\_\_

How did you learn about our services?     Newspaper     Yellow Pages     Brochure  
 Invited by Group Member     Web Site     Referred by: \_\_\_\_\_     Other: \_\_\_\_\_

## Profile of Business (Existing or Proposed)

Mark (X) one or more, if applicable:     New\*     In planning Stage\*     Not yet operational  
 Sole Proprietorship\*     Partnership. How many Partners? \_\_\_\_\_     Incorporated Co.  
 Registered     Employees? How Many? \_\_\_\_\_    Year established: \_\_\_\_\_

Do you have...     Business Plan     Financial Statements     Description of Business  
 Lawyer     Outside Accountant     Advisory Board

COMMENTS (Describe briefly your past experience in business if you have marked any questions where an \* is shown)

## Subjects For discussion with "The Group"

(mark (x) all applicable to your needs)

Marketing     Finance     Management     Expansion     Products     Services  
 Staffing     Operations     Set up/Organize new venture     Review of Business Plan  
 OTHER: \_\_\_\_\_

The BURLINGTON Chamber of Commerce would like to send information on their services and activities to any new business in THEIR AREA. May we pass your name and address on to them? **Please INDICATE:**  Yes  No  already a member

Do you wish a written summary of to-day's consultation? by e-mail  or by regular mail  or no summary



### Acknowledgement and Release

"The Group" is incorporated as a not for profit organization to provide general business advice to interested parties for a nominal fee. The Group could not perform its mandate without formal protection from potential liabilities which might arise in connection with its activities. Hence, the need for this RELEASE, to be acknowledged and signed by the client(s) named in this application.

In consideration, therefore, of their mutual covenants and agreements herein and other valuable consideration, the undersigned agree to pay "The Group" the Consultation Fee specified below, and "The Group" agrees to discuss the client(s) business and any or all subjects relating thereto, provided always that the undersigned client(s) undertake and acknowledge by their signature(s) below that

- i) they release and agree to hold harmless, The Group, its Directors, Officers, employees or any other member of "The Group", from any and all liability, claims, and demands and actions whatsoever, specifically including those related to any advice given, recommendations made, or programs suggested, including, without limitation, related to any activities or actions undertaken arising from the undersigned working with the Advisory Council of the group;
- ii) they have sole responsibility for the implementation of any advice given, recommendations made or programs suggested by "The Group";
- iii) they agree to absolve "The Group" of any liability or responsibility whatsoever where a Director, officer, employee or any other member of The Group enters into a direct personal contract with the undersigned or any of his or her business partners, associates or employees, for his professional services, with or without remuneration, on the basis that such direct contract is not provided by "The Group";
- iv) they acknowledge receipt of The Group's *Privacy Policy Statement* and agree to the disclosure, release and retention of all or any personal information to The Group and its members which may be necessary and relevant to the consultation

Signed: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Date: \_\_\_\_\_  
(If a company, also Print Name(s)/Title(s) of Signatories)

**IMPORTANT:** Please make and retain a copy of this document for your files. Make your cheque payable to "Business Advisory Group" and bring it to the meeting!

### For BAG Office use only

Members of "The Group" taking part in this session: \_\_\_\_\_(moderator)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Consultation Fee charged \$150 \$\_\_\_\_\_ (for Business Plan reviews, a different amount may apply!)

Paid by:  Cash  Cheque Date Deposited \_\_\_\_\_

Follow-up Letter sent by:  e-mail  Regular mail. Date sent \_\_\_\_\_  was not required