



INITIAL CLIENT ASSESSMENT

Business Infrastructure Assessment

HOW TO COMPLETE

Complete every question.
Write N/A when a question does not apply,
and Unknown when you do not know the answer.

HOW TO SUBMIT

Save the completed PDF and email it to
intake@ongridadvisory.com.

DO NOT INCLUDE

Social Security numbers, complete bank account numbers, passwords, or other sensitive credentials.

IMPORTANT

Submitting this assessment does not create a client relationship. OnGrid Advisory will review the information and contact you regarding fit, availability, and possible next steps.

SECTION 01

Business Information

LEGAL BUSINESS NAME

DBA / TRADE NAME (IF APPLICABLE)

STATE OF FORMATION

YEAR BUSINESS STARTED

INDUSTRY

BUSINESS ADDRESS

BUSINESS PHONE

BUSINESS EMAIL

WEBSITE

BUSINESS STRUCTURE

☐ LLC ☐ Corporation ☐ Partnership ☐ Sole Proprietorship ☐ Other

SECTION 02

Ownership & Management

OWNER(S)

OWNERSHIP PERCENTAGE(S)

PRIMARY CONTACT

TITLE

NUMBER OF EMPLOYEES

NUMBER OF CONTRACTORS

SECTION 03

Business Operations

DESCRIBE WHAT YOUR BUSINESS DOES

WHO ARE YOUR PRIMARY CUSTOMERS?

WHAT PRODUCTS OR SERVICES DO YOU PROVIDE?

SECTION 04

Current Business Infrastructure

Select Yes or No for each item.

	YES	NO
Business checking account	☐ Yes	☐ No
Business bookkeeping system	☐ Yes	☐ No
CPA or accountant	☐ Yes	☐ No
Business insurance	☐ Yes	☐ No
Business licenses or permits	☐ Yes	☐ No
Business website	☐ Yes	☐ No
Professional business email	☐ Yes	☐ No
Dedicated business phone number	☐ Yes	☐ No
CRM or customer management software	☐ Yes	☐ No
Payroll system	☐ Yes	☐ No
Document storage system	☐ Yes	☐ No

ADDITIONAL SYSTEMS, TOOLS, OR INFRASTRUCTURE CURRENTLY IN USE

SECTION 05

Financing & Credit

APPROXIMATE ANNUAL REVENUE

- ☐ Under \$50,000 ☐ \$50,000–\$100,000 ☐ \$100,000–\$250,000
- ☐ \$250,000–\$500,000 ☐ Over \$500,000

	YES	NO
Business credit established	☐ Yes	☐ No
Business credit cards	☐ Yes	☐ No
Business loans	☐ Yes	☐ No
Previously applied for business financing	☐ Yes	☐ No

IF YOU PREVIOUSLY APPLIED FOR BUSINESS FINANCING, EXPLAIN THE OUTCOME

CURRENT BUSINESS DEBT, TAX OBLIGATIONS, COLLECTIONS, LIENS, OR LITIGATION, IF ANY

SECTION 06

Your Goals

WHY ARE YOU CONTACTING ONGRID ADVISORY NOW?

WHAT WOULD YOU LIKE YOUR BUSINESS TO ACCOMPLISH DURING THE NEXT 12 MONTHS?

Are you seeking financing? ☐ Yes ☐ No

PURPOSE

ESTIMATED AMOUNT

DESIRED TIMELINE

WHAT WOULD A SUCCESSFUL ENGAGEMENT WITH ONGRID LOOK LIKE TO YOU?

SECTION 07

Supporting Documents

Check the documents you currently have available. OnGrid Advisory may request specific documents after reviewing this assessment.

- | | |
|---|--|
| ☐ Articles of Organization / Incorporation | ☐ EIN confirmation letter |
| ☐ Operating agreement / bylaws | ☐ Business license(s) |
| ☐ Business bank statement(s) | ☐ Financial statements |
| ☐ Business tax return(s) | ☐ Insurance certificate |

OTHER DOCUMENTS

SECTION 08

Client Acknowledgement

- ☐ I certify that the information provided in this assessment is accurate to the best of my knowledge.
- ☐ I understand that submitting this assessment does not create a client relationship or guarantee that OnGrid Advisory will accept my engagement.
- ☐ I understand that OnGrid Advisory provides business advisory services and does not provide legal, tax, accounting, investment, lending, or credit-repair advice.
- ☐ I understand that OnGrid Advisory does not guarantee financing, credit, approval, or any specific business outcome.

NAME

TITLE

SIGNATURE (TYPE FULL NAME)

DATE