

CLIENT INTAKE FORM TEMPLATE

Business Name: _____

Date: _____

Universal client intake form template for service businesses. Collects contact info, service preferences, referral source, and relevant background information.

** Required fields*

Full Name *

Preferred Name

Email *

Phone Number *

Date of Birth

Address

How did you hear about us?

Options: Google search / Instagram / Facebook / TikTok / Yelp / Friend/family referral / Walk-by / Other

Service(s) you're interested in *

Have you used this type of service before?

Options: Yes — regularly / Yes — a few times / No — first time

Preferred appointment days

Options: Weekdays / Weekends / No preference

Preferred contact method *

Options: Email / Text / Phone call

Any allergies, conditions, or concerns we should know about?

Anything else you'd like us to know?

Client Signature: _____

Date: _____

Print Name: _____