|  |  |  |
| --- | --- | --- |
| **Client:** |  |  |
| **Date:** |  |  |

**CLIENT INFORMATION**

|  |  |
| --- | --- |
| BUSINESS NAME, ENTITY TYPE, & EIN | |
| *Business Name* |  |
| *Entity / Activity Type* |  |
| *EIN* |  |
| PRIMARY CONTACT NAME & INFO | |
| *Name* |  |
| *Phone* |  |
| *E-mail* |  |
| SECONDARY CONTACT NAME & INFO | |
| *Name* |  |
| *Phone* |  |
| *E-mail* |  |
| BUSINESS ADDRESS | |
| *Street/PO Box* |  |
| *City/State* |  |
| *Zip Code* |  |
| ONLINE PRESENCE | |
| *URL* |  |
| *Facebook* |  |
| *Instagram* |  |
| ADDITIONAL INFORMATION | |
| *Documents* |  |
| *Other* |  |

**PROJECT STATUS**

CLIENT: DATE:

|  |  |
| --- | --- |
| DELIVERABLES IN PROGRESS | |
| *Deliverable Description* |  |
| DELIVERABLES COMPLETED | |
| *Deliverable Description* |  |
| BILLING STATUS | |
| *Invoice(s)* |  |
| *Balance Due* |  |
| ADDITIONAL INFORMATION | |
| *General Info* |  |

**MEETING NOTES**

CLIENT: DATE:

|  |  |
| --- | --- |
| TOPICS & ACTION ITEMS | |
| *TOPIC #1* |  |
| *ACTION ITEMS* |  |
| *TOPIC #2* |  |
| *ACTION ITEMS* |  |
| *OTHER QUESTIONS/COMMENTS/NOTES* |  |

**FOR INTERNAL USE ONLY**

Received & Entered by:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_