Client Intake Form

This intake form is used to gather the information required to evaluate whether a prospective project is a good fit for my consulting services.
Completing this form does not constitute a contract, agreement, or commitment from either party. It is an exploratory step used to determine feasibility, alignment, and next steps.

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1. Organization Information

Organization Name:
Primary Contact Name:
Role/Title:
Email:
Phone (optional):
Website (if applicable):

Type of Organization:
(Examples: financial firm, research lab, technology company, startup, academic institution, individual researcher)

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2. Project Overview

Brief description of the problem or project:
(High-level summary in your own words)

Primary objectives:
(What you want to achieve)

Why this project is being pursued now:
(Context, urgency, business or research drivers)

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3. Technical Scope

Type of work required (select all that apply): - ML model development
- Research pipeline design
- ML infrastructure or orchestration
- Data processing or feature engineering
- Quant modeling or risk modeling
- System integration
- HPC workflows
- Codebase review or advisory
- Other (describe below)

Existing tools or frameworks in use:
(Examples: PyTorch, LightGBM, XGBoost, TensorFlow, internal systems, proprietary data platforms)

Expected deliverables (if known):
(Models, pipelines, research modules, documentation, integration components, etc.)

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4. Data & Environment

Data availability:
(What data exists, where it lives, format, accessibility)

Data sensitivity:
(PII, financial data, proprietary datasets, compliance requirements)

Compute environment:
(Cloud provider, on-prem servers, VM setup, GPUs/CPUs available, internal tooling)

Access constraints:
(VPN, VPC restrictions, remote access requirements, security policies)

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5. Timeline & Urgency

Ideal start date:
Ideal completion window:

Urgency level: - Standard
- High priority
- Critical / time-sensitive

Deadlines or external dependencies:
(Examples: product launches, research deadlines, regulatory timelines)

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6. Budget Range

Estimated budget range for this engagement:
(Non-binding; used for scoping and feasibility evaluation)

Examples: - Under $10,000
- $10,000–$25,000
- $25,000–$50,000
- $50,000+
- Not sure / need guidance

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7. Stakeholders & Decision Process

Primary decision-maker(s):
Additional stakeholders or teams involved:
(Engineering, research, trading, compliance, management)

Procurement or vendor requirements:
(If known: insurance requirements, onboarding processes, security reviews, etc.)

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8. Additional Information

Anything else relevant to understanding your project, constraints, or goals:
(Optional but helpful)

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9. Disclaimer

Completion of this form is for evaluation purposes only and does not create a contractual relationship.
Formal scoping, pricing, and commitments occur only after:

- LLC formation and business insurance are complete
- An initial assessment call (if needed)
- A Statement of Work (SOW) is drafted and approved
- A Master Consulting Agreement (MCA) is signed
- Upfront payment or retainer (if required) is received

Please return this completed form via email.
Responses will be reviewed to determine alignment, feasibility, and potential next steps.