

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.

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)

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)

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.)

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/CPU available, internal tooling)

Access constraints:

(VPN, VPC restrictions, remote access requirements, security policies)

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)

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

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.)

8. Additional Information

Anything else relevant to understanding your project, constraints, or goals:

(Optional but helpful)

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.