

# 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/CPU 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
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Please return this completed form via email.

Responses will be reviewed to determine alignment, feasibility, and potential next steps.