



CLIENT APPLICATION FORM

Client Information

Client Name _____

Farm or Business
Name _____

Address _____

Phone _____ Fax _____

Email _____

Project Outline

Please share information if available, or leave sections blank if unknown (see sample, last page)

Are you... Starting a new business? Changing over your existing business?
 Forming a new partnership? Expanding your existing operation?

Expected Start Date _____ Expected End Date _____

Describe Current Business (if applicable):

Location _____

Facilities _____

Products _____

Production
Capacity _____

Livestock _____

Other _____



CLIENT APPLICATION FORM

Core Staff:

Name _____ Title _____

Duties _____

_____ Hours _____

Name _____ Title _____

Duties _____

_____ Hours _____

Name _____ Title _____

Duties _____

Project Description

Does your plan include.....

- Livestock/ poultry production
- Fruit or veg production
- Fruit or veg processing
- Meat processing
- Agricultural services
- Cheese/ milk processing
- Non-production retail/ wholesale
- Other

Briefly describe your business concept:



CLIENT APPLICATION FORM

Business Plans, Financial Strategies, Research Completed (if any):

Project Phases

Step 1: Begin date: _____ End Date: _____

Documentation/ permits required:

1) _____

2) _____

3) _____

Services Needed: From NABC Other

Describe: _____

_____ Est. cost if known \$ _____

Other details in Step 1: _____

Step 2: Begin date: _____ End Date: _____

Documentation/ permits required:

1) _____

2) _____

3) _____

Services Needed: From NABC Other



CLIENT APPLICATION FORM

Describe: _____

_____ Est. cost if known \$ _____

Other details in Step 2: _____

Please attach and label separate sheets as needed

NABC Service Fulfillment

Please describe NABC's role in your project during and after completion:

Project Completion

Please briefly describe what you hope to achieve with your project:

Client Responsibilities

Client is solely responsible for all debts and contractual obligations between client and contractors. No guarantees are expressed or implied by NABC regarding the performance of, or results anticipated from work performed by consultants, contractors, or other professionals referred to client or hired by NABC.

NABC is responsible only for completing services for clients per individual agreements, and not for any results anticipated or arising from services rendered.



CLIENT APPLICATION FORM

Estimates of service costs provided by agencies and businesses outside the NABC are provided in the Client Agreement strictly for client convenience and reference. NABC makes no claims to accuracy of estimates from non-NABC entities.

Client is solely responsible for meeting all grant, loan, work permit or other application deadlines, and for accuracy and completeness of all information submitted by client to any agency or financial institution. NABC is held harmless from any loss sustained by client resulting from inaccurate, missing, late or incomplete documents or information.

I have read and agreed to accept the client responsibilities as stated above:

Sign Name *Date*

Print Name *Title*

Farm/ Business Name _____

CLIENT APPLICATION FORM SAMPLE

Project Outline

Please share information if available, or leave sections blank if unknown (see sample, last page)

Are you... Starting a new business? Changing over your existing business?
 Forming a new partnership? Expanding your existing operation?

Expected Start Date: *As soon as possible* Expected End Date: *March next year*

Describe Current Business (if applicable):

N/A

Project Description

Does your plan include....

Livestock/ poultry production Fruit or veg production Fruit or veg processing Meat processing
 Agricultural services Cheese/ milk processing Non-production retail/ wholesale Other



CLIENT APPLICATION FORM

Briefly describe your business concept:

I want to process my own organic berries into jams and jellies, and sell them at my roadside stand along with frozen berries pre-measured into "instant pie kits." I will also sell the berries as U-Pick. I need to know whether I am zoned correctly for off-farm sales, and if so what the regulations are for processing, sales, and any other requirements. I need a business plan, and a financial plan to acquire a loan. I already have a 4- acre farm near a main road, and well-established berry plants of popular varieties. The site is a former berry farm, but the old storage buildings are beyond repair.

Business Plans, Financial Strategies, Research Completed (if any):

I will use loan funds to purchase equipment, build a sales shed, make customer-friendly additions to the farm (such as washing stations and tasting garden), and create a marketing campaign. I have the technical information on freezing berries, and have calculated the cost of running the freezer. I have not yet figured out the cost of packaging & staff time to do so.

Project Phases

Step 1: Begin date: As soon as possible End Date: March next year

Documentation/ permits required:

1) Unknown

Services Needed: From NABC Other

Describe: *I need a business plan from EDASC, a financial plan from the local EDC, and a referral to a marketing specialist from the NABC.* Est. cost if known: *Unknown*

NABC Service Fulfillment

Please describe NABC's role in your project during and after completion:

I need hands-on guidance through every step to ensure that I don't miss some important procedure, documentation, or other angle to help my business succeed. I need referrals to professional contractors and business developers. It would be great if someone could go with me to the meetings with the bank to help answer questions if I get stuck.

Project Completion

Please briefly describe what you hope to achieve with your project:

I want to establish a comfortable living that will pay my bills with a little leftover for savings and retirement. I want to develop a lifestyle as much as a business, and see myself doing this 20 years from now. I want to develop a loyal customer base and get to know them as individuals. I want to farm sustainably, and be a model for others who want a rural home-farm.



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I have read and agreed to accept the client responsibilities as stated above:

Jane Farmer

June 30, 2006

Sign Name

Date

Jane Farmer

Owner, Manager

Print Name

Title

Farm/Business Name

Juicy Acres Berry Farm