

MARKETING CLIENT INTAKE FORM

Client Name: _____ Company (if applicable): _____

Contact Information:

Phone: _____ Email: _____

Address Information:

Street Address: _____

City: _____ State: _____ Zip Code: _____

Project/Service Information:

Type of Service Needed: _____

Project Description and Goals:

Budget and Timeline:

Estimated Budget (USD): _____

Desired Start Date: _____ Desired Completion Date: _____

Marketing Channels and Preferences:

Preferred Marketing Channels (check all that apply):

- | | | |
|--|---|---|
| ☐ Social Media | ☐ Email Marketing | ☐ SEO/SEM |
| ☐ Content Marketing | ☐ Paid Advertising | ☐ Events/Trade Shows |
| ☐ Other (please specify): | | |

Additional Notes or Requirements:

1. Client affirms that all information provided is true, accurate, and complete to the best of their knowledge.
2. Client consents to the use of provided information for marketing and communication purposes in accordance with applicable U.S. law.
3. Client understands and agrees that no guarantees or warranties are made regarding specific marketing results or outcomes.
4. Client agrees to indemnify and hold harmless the Marketing Agency from any claims arising from the use of Client information.
5. This Intake Form constitutes part of the contractual relationship between Client and Marketing Agency and shall be governed by U.S. law.
6. Any disputes arising shall be subject to the exclusive jurisdiction of courts located in the state agreed upon in subsequent documentation.
7. Client acknowledges the importance of timely and truthful communication to ensure effective marketing services and compliance.

CLIENT SIGNATURE

MARKETING AGENCY REPRESENTATIVE SIGNATURE

Signature: _____

Signature: _____

Printed Name: _____

Printed Name: _____

Title (if applicable): _____

Title: _____

Original source of this document:

<https://formtemplate-us.com/marketing-client-intake-form/>

Did you find this template helpful?

Find more updated templates at:

<https://formtemplate-us.com/>

[View more templates](#)

This template is intended exclusively for personal, non-commercial use.
If distributed or published, the source must be mentioned.

This template is provided for guidance only and does not constitute legal advice.
It is recommended to consult a legal professional for each specific case.