

## EXPORTBelize Form 1 - Client Intake Form

<b>Client Profile Form</b>	<a href="http://www.belizeinvest.org.bz">www.belizeinvest.org.bz</a>
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Primary Adviser: (office use only)

Tier: (office use only)

Priority Sector: (office use only)

### Part 1 Contact Information

<b>First Name:</b>	<b>MI:</b>	<b>Last Name:</b>
<b>Email Address:</b>		
<b>Position:</b> <input type="checkbox"/> Owner <input type="checkbox"/> Partner <input type="checkbox"/> CEO <input type="checkbox"/> President <input type="checkbox"/> Employee <input type="checkbox"/> Representative <input type="checkbox"/> Other:		
<b>Work Phone:</b>	<b>Home Phone:</b>	
<b>Fax:</b>	<b>Mobile Phone:</b>	
<b>Mailing Address:</b>		
<b>City:</b>	<b>District:</b>	
<b>Gender:</b> <input type="checkbox"/> Male <input type="checkbox"/> Female		

### Part 2 Company Information

<b>Company Name:</b>	<b>Type:</b> <input type="checkbox"/> Company <input type="checkbox"/> Business <input type="checkbox"/> Co-operative <input type="checkbox"/> Other
<b>Status:</b> <input type="checkbox"/> Near export ready <input type="checkbox"/> New exporting/export ready <input type="checkbox"/> Established exporter <input type="checkbox"/> Emerging Industry	<b>Date Established (MM/DD/YY):</b>
<b>Capital Investment:</b> \$ _____ Belizean Dollars	<b>Date Registered (MM/DD/YY):</b>
<b>Ownership:</b> <input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Both	<b>Website:</b> <b>Social Media: (Facebook/Instagram)</b>
<b>Sector:</b> _____ (Mandatory)  (please refer to list of sectors at end of form- if none apply from list, kindly write other and specify sector)	
<b>Business Type:</b> <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Corporation <input type="checkbox"/> LLC <input type="checkbox"/> Partnership <input type="checkbox"/> Other:	
<b>International Activity:</b> <input type="checkbox"/> Export <input type="checkbox"/> Import <input type="checkbox"/> Both <input type="checkbox"/> None	
<b>Company Address:</b>	
<b>City/Town/Village:</b>	<b>District:</b>
<b># Employees:</b> Full Time:              Part Time: Female:                Female: Male:                  Male:	<b>Description of Services/Products:</b>
<b>What kind of assistance is required:</b> <input type="checkbox"/> Incentives <input type="checkbox"/> Export Business Plan Development <input type="checkbox"/> Financing Options <input type="checkbox"/> Marketing /Promotion <input type="checkbox"/> Product Market Research <input type="checkbox"/> Product Development <input type="checkbox"/> Quality Standards /Certifications <input type="checkbox"/> Accounting <input type="checkbox"/> Export Guideline <input type="checkbox"/> Formalization <input type="checkbox"/> Other (Specify) :	

Disclaimer: "By filling out, signing, and returning the Counseling Request Form by email or by Fax, you are authorizing an electronic substitute of your written signature on the form,"

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<b>Production/Service Capacity:</b>	
Do you conduct your business online? <input type="checkbox"/> Yes <input type="checkbox"/> No	HS Code:
<b>Part 3</b>	<b>Export Information</b>
Do you export already? <input type="checkbox"/> Yes <input type="checkbox"/> No	If "Yes", list service(s)/product(s):
<b>Description of Service(s)/Products:</b>	
For how long you have been exporting:	Country(ies) you export to:
Main market access requirements:	Difficulties faced when exporting:
New markets of interest:	Collateral Material (Promotion):
Specific market segments:	Number of units:
Unit value (Estimate \$ BZD):	Total value (Estimate \$ BZD)
If "No", which service/product would you like to export:	
<b>Description of merchandise:</b>	
Country(ies) you want to export to:	Number of units:
Unit value:	Total value:

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Part 3 Client Service & Confidentiality Agreement	
EXPORTBelize overview	www.belizeinvest.org.bz
<p><b>Who We Are</b> EXPORTBelize is a unit of the Belize Trade and Investment Development Service (BELTRAIDE) which is a statutory body under the Ministry of Trade, Investment Promotion, Private Sector Development and Consumer Protection.</p> <p><b>Our Vision:</b> Enabling a dynamic and competitive export sector that is founded on principles of quality, innovation, and customer orientation.</p> <p><b>Our mission:</b> To foster and enabling environment that promotes diversification and competitiveness of Belize's Export Sector.</p> <p><b>Our Objective:</b> To encourage competitiveness of local business and promote their products and services regionally and internationally.</p> <p><b>Our Commitment to Clients:</b> We pledge to: Put our client's interests first, Display professionalism always, Be open and truthful, and Maintain 100% confidentiality.</p> <p><b>Our Client's Commitment to Us</b> Nobody knows your business better than you do, so all projects require your full participation and commitment. We ask that you actively collaborate with your assigned officer/agent to successfully complete your project. Whether it's providing information or analyzing market research, client involvement is a key success factor.</p>	<p><b>Improving Quality and Measuring Success</b> Export Belize can only record success if our clients are successful. We can only measure this success if our clients participate in future quality and economic impact surveys. This will allow Export Belize to continue to offer a full array of export development and export promotion services.</p> <p>The surveys are as follows:</p> <ul style="list-style-type: none"> <li>• <b>Client Satisfaction Survey</b> – within Six months of your first interaction with ExportBelize, you will receive via e-mail a very short "Client Satisfaction Survey."</li> <li>• <b>Client Growth Assessment</b>– Clients who have received our services will be sent a client Growth Assessment form at the end of the quarter to record any achievement that came as a result working with ExportBelize.</li> </ul> <p>Your participation is vital to the continued development of ExportBelize.</p> <p><b>Confidentiality</b> All client information gathered is 100% confidential and is only used to report aggregate economic impact numbers.</p> <p>Thank you for your interest in ExportBelize, we look forward to serving you in the future and helping your business to take advantage of global opportunities.</p>

Client Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Advisor Signature: \_\_\_\_\_

Date: \_\_\_\_\_

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