



CONSTRUCTION LIEN SPECIALISTS

## CUSTOMER INTAKE FORM

The purpose of this intake form is to gather general Customer information. By helping to complete this document, you are authorizing to share this document with our in-house legal team and our administrative staff.

### PRELIMINARY INFORMATION:

Company Name:

Company Number:

Company Mailing Address:

Phone:

Email:

Licensee Name:

Number of Annual Projects:

Company Name:	
Company Number:	<i>Office Only</i>
Company Mailing Address:	
Phone:	
Email:	
Licensee Name:	
Number of Annual Projects:	

### PAYMENT INFORMATION:

Providing credit card information does not constitute authorization to make a charge. Only after a New Project Intake Form has been completed will any charges be authorized.

Name on Card:

Credit or Debit Card Number:

CVC:

Expiration:

Address Associated with Card:

Name on Card:	
Credit or Debit Card Number:	
CVC:	
Expiration:	
Address Associated with Card:	

### CUSTOMER EXPECTATIONS:

After completing this Customer Intake Form, please email it to [info@clsnnow.com](mailto:info@clsnnow.com). Our team will then enter the customer's information into our CRM and prepare both a digital and physical file.

Please note:

- Commissions are paid only after the customer has started a project and made full payment.
- This is **not** a subscription service. Each new project requires the customer to re-engage and submit a separate New Project Intake Form.
- Customers are charged only when they complete and authorize payment on the New Project Intake Form.
- If you have any questions, feel free to contact us at [info@clsnnow.com](mailto:info@clsnnow.com).