

CLIENT / BUSINESS

DATE

PREPARED BY

REFERRED BY (FINDER'S FEE – 15% OF SETUP)

FRIENDS & FAMILY? (25% OFF SETUP)

Everything below helps us build your site right the first time. Skip anything that doesn't apply — we'll cover the rest together. **Don't write passwords on this form;** we'll send a secure, encrypted way to share account access. Questions while you fill this out? Reach **Tony Garcia** at 831-747-0564 or info@tmg2s.com · tmg2s.com.

01 Your business

BUSINESS / LEGAL NAME

DBA / TRADE NAME

WHAT YOU DO (ONE LINE)

INDUSTRY

YEARS

LOCATIONS / SERVICE AREA

HOURS

02 Primary contact

NAME

TITLE

EMAIL

PHONE

BEST WAY / TIME TO REACH YOU

03 Goals

PRIMARY GOAL OF THE SITE

- Get found (SEO) Generate leads / calls Book appointments Sell online Look credible Other

WHO ARE YOUR CUSTOMERS?

WHAT DOES SUCCESS LOOK LIKE IN 90 DAYS?

COMPETITORS OR SITES YOU'D BE COMPARED TO

04 Plan & add-ons

PLAN

- Launch \$49/mo Grow \$149/mo Autopilot \$279/mo Undecided — recommend one

ADD-ONS OF INTEREST

- Social (FB / IG / LinkedIn) Web firewall Extra mailboxes Monthly reporting Brand-protection domains Merch shop

05 Pages needed

- Home About Services / Products Pricing Gallery / Portfolio Testimonials Blog / News FAQ Booking

- Shop Contact Other

ESTIMATED # OF PAGES

06 Brand assets — logos, colors, photos

LOGO

- I have it (send vector .svg/.ai/.eps or high-res .png) Need one designed Need a refresh

BRAND COLORS (HEX IF KNOWN)

FONTS

TAGLINE / SLOGAN

PHOTOS & IMAGES

- I'll provide my own (high-res) Need professional photography Use stock imagery A mix Have a brand guide

WHAT PHOTOS / IMAGES DO YOU ALREADY HAVE?

07 Content & copy

WHO WRITES THE WEBSITE COPY?

- You provide it We write it (Grow / Autopilot) A mix

SERVICES / PRODUCTS TO FEATURE

SHOW PRICES ON THE SITE?

OWNER / TEAM — NAMES & ROLES (BIOS + HEADSHOTS TO SEND)

YOUR STORY / MISSION (A FEW LINES)

TESTIMONIALS / REVIEWS TO FEATURE

CERTIFICATIONS / LICENSES / AWARDS

08 Domain & email

DESIRED DOMAIN

CURRENT WEBSITE (IF ANY)

DOMAIN

REGISTRAR (IF OWNED)

BUSINESS EMAIL — # MAILBOXES

- I own it Need to register

09 Features & functionality

- Contact form Online booking E-commerce / store Photo gallery Blog / news Newsletter signup Live chat
 Map / directions Reviews widget Other

10 Style & inspiration

LOOK & FEEL

- Modern Classic Bold Minimal Warm Corporate Playful

COLORS TO USE

COLORS TO AVOID

2-3 WEBSITES YOU ADMIRE (AND WHY)

11 Accounts & access

Do not write passwords here. We'll send you a secure, encrypted way to share account access — that's security built in, not bolted on. Just check what you'll need to share:

- Domain registrar
- Current web host
- Google Business Profile
- Social accounts (for management)
- Email / DNS

12 What to send us — asset checklist

- Logo (vector or high-res PNG)
- Brand colors / fonts / guide
- Photos & images (high-res)
- Owner & team bios + headshots
- Services / products list & descriptions
- Testimonials / reviews
- Certifications / licenses / awards
- Existing marketing materials

SECURE UPLOAD LINK (WE'LL PROVIDE)

13 Anything else?
