|  |  |
| --- | --- |
|  | Ideal client profile |

The following are profile templates for individuals, for-profit entities and non-profit organizations.

Individuals

|  |  |
| --- | --- |
| **Criteria** | **Description** |
| Type |  |
| Income |  |
| Net worth |  |
| Location |  |
| Age |  |
| Issues |  |
| Needs |  |
| Fees |  |
| Intangibles |  |
| Other |  |

For-profit entities

|  |  |
| --- | --- |
| **Criteria** | **Description** |
| Type |  |
| Revenue |  |
| Profitability |  |
| Value |  |
| Employees |  |
| Location |  |
| Issues |  |
| Needs |  |
| Fees |  |
| Intangibles |  |
| Other |  |

Non-profit organizations

|  |  |
| --- | --- |
| **Criteria** | **Description** |
| Type |  |
| Revenue |  |
| Employees |  |
| Location |  |
| Issues |  |
| Needs |  |
| Fees |  |
| Intangibles |  |
| Other |  |