

Client intake question planner

Sort every question into must-have, useful or never-collect before you build the form.

1. Sort your questions

For each question, ask: will I act on this answer before or at the first meeting? If not, cut it.

Question	Must-have	Useful	Cut	Page
	☐	☐	☐	
	☐	☐	☐	
	☐	☐	☐	
	☐	☐	☐	
	☐	☐	☐	
	☐	☐	☐	
	☐	☐	☐	
	☐	☐	☐	
	☐	☐	☐	
	☐	☐	☐	

2. Usually must-have

- ☐ Full name, email, phone
- ☐ What they want help with, in their words
- ☐ The one deadline or date that matters
- ☐ How they prefer to be contacted
- ☐ Consent to your terms, with a link to them

3. Never collect in an intake form

- ☐ Card numbers or bank details (use a payment link or invoice)
- ☐ Social Security or government ID numbers, unless the law requires you to
- ☐ Passwords or logins to their accounts

- ☐ Health details, if HIPAA applies to you and your form tool will not sign a business associate agreement

4. Page layout

Page	Contents
1. About you	
2. What you need	
3. Final details	Anything else; consent; signature

5. Before you send it

- ☐ Filled in on a phone in under the time you promise in the intro
- ☐ Every follow-up question tested with a yes and a no
- ☐ Intro says how long it takes and why you ask
- ☐ Link sent at least a day before the first appointment

The full guide, with the video: fynl.io/blog/client-intake-form-template/

Free form builder: fynl.io/free-form-builder