



Client Rights & Responsibilities

As a client of a Small Business Development Center (SBDC), a member of the Colorado SBDC Network and the National Association of SBDCs, we'd like to advise you of certain rights and responsibilities you have as one of our clients.

You have a right to expect:

- Prompt, courteous, and professional counseling services and to be advised if the CSBDC is unable to provide services within the time frame required. Be aware, due to the demand for our services, cases must often be prioritized by need and training may be recommended before counseling is provided.
- All information shared with the CSBDC and any of its resources (staff, faculty, volunteers, and consultants) will be held in strict confidence. Information provided by you will not be used to the advantage of any staff member, consultant, other resource of the CSBDC or any third party.
- You have a right to expect your client status with the CSBDC will remain confidential. No public use of your name, business name, address or phone number will be made without your prior written approval. Please note, however, the CSBDC is partially funded by the US Small Business Administration and a limited amount of information with respect to your client status - name, address, nature and scope of services - is provided to that agency.
- You have the opportunity to receive counseling from an attorney/CPA as an SBDC consultant. Legal or professional advice will not be given only options as to legal structuring or other professional opportunities. The client session notes (and all other materials related to counseling) will belong to the SBDC and not protected under attorney-CPA/client privileges and subject to review by the Lead Center or SBA. If you so choose to become a client of the attorney/CPA, you can always return to the SBDC for free one-on-one consulting.

Our role is to counsel and assist small business owners and those planning to go into business. We will not make business decisions or judgements for you, though we will make recommendations and suggestions as appropriate. These will be based upon our best efforts to apply the experience and resources available, in order to assist you in making your own business decisions.

The CSBDC may charge reasonable fees for training programs, special services and publications; however, you have a right to feel secure that no fee will be charged by the CSBDC or its resources for normal counseling services. No fees may be paid to or accepted for counseling services. Also, no recommendations will be made as to the purchase of goods or services from any specific individual or firm with which any CSBDC staff member or its resources have any financial, familial or personal interest.

The counseling services, which are provided to you by the CSBDC, are part of the effort of the Colorado Office of Economic Development (OED) to respond to the growing needs of the small business community. They are not intended to compete with, replace or be a substitute for services available from the private sector. Clients whose needs can be fully met by private sector practitioners or firms in an affordable manner will be encouraged to use those resources.

In consideration of the CSBDC furnishing you with management and technical assistance, you agree to waive all claims against the CSBDC and its constituent institutions, its staff and any other resources employed by or used in connection with these services. You will be expected to cooperate with the CSBDC in its efforts to assure quality and effectiveness of counseling services which it provides.

In this respect, the CSBDC will ask all clients who received counseling assistance or attended training programs to complete a written evaluation of services provided. In addition, all clients who receive four or more hours of counseling assistance may be asked to complete a brief "impact" assessment within one year following the close of a case file. Finally, clients may receive direct inquiries from this office, the state director's office, the US Small Business Administration, or third party evaluators contracted by the CSBDC with respect to the services provided to you. Your response to all these inquiries will be greatly appreciated.

We welcome you as a client and encourage you to call on us if you have any questions or comments with regard to your rights and responsibilities with respect to our services. You can do so by calling your local SBDC Director or the Colorado SBDC State Director at (303) 892-3840.

Additional information and small business resources are available through the CSBDC website at www.coloradosbdc.org and through the Colorado Business Assistance Center at (303) 592-5920.

Client's Signature

Print Client's Name

Title

Date

SBDC Counselor

Print Counselor's Name

The Colorado Small Business Development Center Network is partially funded by the US Small Business Administration. The support given by the US Small Business Administration through such funding does not constitute an express or implied endorsement of any of the co-sponsors' or participants' opinions, products or services. The Colorado SBDC is a partnership between the Colorado Office of Business Development, the US Small Business Administration, Colorado's institutions of higher education, and local economic development organizations.

The Colorado SBDC helps clients gather information for business plans to present to financial institutions for loan requests. The SBDC is not a banking institution and does not loan money to businesses. It does not give specific tax and legal advice. The client is referred to professionals for tax and legal advice.