

# Preliminary Client Assessment

Date: [Insert Date]

To,

[Client's Name]

[Client's Address]

[City, State, Zip Code]

Dear [Client's Name],

Thank you for choosing [Your Company Name] for your needs. We are pleased to begin the preliminary assessment of your requirements. This document outlines the information we will need to proceed effectively.

## Client Information

**Name:** [Client's Name]

**Company Name:** [Company Name]

**Contact Number:** [Contact Number]

**Email Address:** [Email Address]

## Project Overview

Please briefly describe the project you would like us to assess:

[Project Description]

## Assessment Objectives

What are the key objectives you hope to achieve through this assessment? Please list them:

[Objective 1]

[Objective 2]

[Objective 3]

## **Additional Information**

If there are any specific constraints, deadlines, or requirements that we should be aware of, please mention them below:

[Additional Information]

We will review the information provided and follow up with any questions. Please feel free to reach out to us at [Your Contact Information] should you have any queries.

Thank you for your time and cooperation.

Sincerely,

[Your Name]

[Your Title]

[Your Company Name]

[Your Contact Information]