



This checklist helps collect basic information regarding your business. It can be filled in by hand, or documents containing the information can simply be provided. If any of the information was already provided or is on your website, check the box and leave blank.

Company Information Please see company website

Company Name: _____

Company Type: ___ Sole Prop ___ Partnership ___ C Corp ___ LLC ___ S Corp

Business Plan is for: (check all that apply)

 ___ for Starting Up ___ New Bank Loan ___ Equity Investors

 ___ Expansion ___ improvement ___ New Product

 ___ New Market ___ Sell of Company ___ _____

Website: _____

Owner Names: _____

Are any owners: Ethnic Minorities Veterans Disabled
(This information will be used to identify funding and grant opportunities)

Existing Professional Services

CPA _____ Legal _____

IT _____ Insurance _____

Banker _____ Other _____

Management and Key Personnel Please see company website

<u>Title</u>	<u>Name</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

* If Bio's or resumes are available for each of the above, please include.



General Funding Requirements

This information will be used to begin identifying potential funding sources. If exact values are not known, simply provide a range of values for each category.

\$ _____ for equipment \$ _____ for inventory
 \$ _____ for advertising \$ _____ for operating funds
 \$ _____ for buildout \$ _____ real estate
 \$ _____ for R&D \$ _____

Current Funding Raised To-Date

(Can provide range if exact values not yet known)

\$ _____ Owner(s) Cash Investment
 \$ _____ Outside Investors
 \$ _____ Business Bank Loan
 \$ _____ Line of Credit (or Credit Cards)
 \$ _____ Grants or Awards
 \$ _____ Government Loans or Incentives

General Operating Information

(Can provide range if exact values not yet known)

\$ _____ Desired Annual Sales Revenues
 \$ _____ Previous Year Annual Revenues
 \$ _____ Projected Current Year Revenues

Other Comments or Important Facts

Date or month that business plan needs to be completed: _____

Other Important Facts:

