

History and Nature of Business

Company Name: _____

1. Describe the company/business (past and present, history of profitability, type of business, key personnel, etc.)

2. Describe your products or services (What is your trade area? Are your sales seasonal?)

3. Describe your customer (Who? Market Segment? Key Customers?)

4. How do you market your products or services? (types of advertising, direct mail, outside sales, etc.)

5. What is the geographic market area served by your business?

Initial

6. List key suppliers (What would you do if you lost a key supplier?) _____

7. List at least three major competitors (how does your business differ from theirs?): _____

8. **Business Location** (what is the size (sf) of your current facility and lot?)

Is the business now (or to be) located in leased or owned space?

Leased: Now Will be leased

Owned: Now Will be owned

If leased, when does the lease expires? _____

If moving to a new location, describe the affect on your business (size, access, competition)

9. **How will this loan affect your company?** (Credit not otherwise available? Terms not otherwise available?)

10. **Job Creation** (if any)

What is the current number of full-time employees? _____ part-time employees? _____

After the loan, what will be the number of full-time employees? _____ part-time employees? _____

11. **Future Expansion** (does your company have plans for future expansion? Please describe)

X

Name:

Title: