

## Business Information

Company Name:

DBA (if applicable)

---

---

Business Site Address

Nature of Business

---

---

Tax ID Number

Telephone

Email Address

---

---

---

Type of Entity:  Corporation  Partnership  LLC Other \_\_\_\_\_

Does the business operate under a franchise or licensing agreement:  Yes  No

Does the business have any dealer, retailer, or management agreement?  Yes  No  
if yes, provide copy of the agreement

### Ownership & Management

Name

Title

M/F

% Ownership

Email

---

---

---

---

## History and Background of Business

1. How will this loan benefit the company

---

---

---

---

2. Why did you decide to purchase (or start) this business?

---

---

---

---

3. Describe the company/business (past and present, type of business)

---

---

---

---

4. Describe your products or services:  
What is your trade area? Are your sales seasonal?

---

---

---

---

5. Describe your customers (Who? Market Segment? Geographic Market Area? Key Customers?)

---

---

---

6. Describe your management team and key employees

---

---

---

---

7. Describe Management Succession plan should you or a key member of your management die or become disabled or unable to work

---

---

---

8. How do you market your product/services?

---

---

---

9. List key suppliers / vendors (What would you do if you lost a key supplier?)

---

---

---

10. If you lost one of these key suppliers, how would that affect your business and what would you do?

---

---

---

---

11. List at least three major competitors

---

---

---

12. How does your business differ from theirs?

---

---

---

---

13. Are you planning any significant business model changes and if so, how will this affect your revenue streams?

---

---

---

---

14. Business Location:

---

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 expire? \_\_\_\_\_

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

---

---

---

15. What is the size (Sq Ft) of your current facility? \_\_\_\_\_

How many locations do you currently have? \_\_\_\_\_

16. Job Creation (if any)

What is the current number of full-time employees? \_\_\_\_\_  
What is the current number of part-time employees? \_\_\_\_\_  
What will be the number of FT employees (after the loan) \_\_\_\_\_  
What will be the number of PT employees (after the loan) \_\_\_\_\_

If you plan for employee growth, please explain and include:  
Roles, Pay Rate by Role and Full or Part Time employee designation  
along with expected time line of this growth.

---

---

---

---

17. Describe your vision for the company over the next five (5) years including growth plans, changes in customer base, future capital expenditures, current v. future capacity, management structure, etc.

---

---

---

Signed this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_

X \_\_\_\_\_  
Name:

\_\_\_\_\_  
Title