

Executive Summary

for

Date:

Contact:

Prepare by:

A. Business Overview

I. What is your Business Name?

II. When Was Your Business Established?

III. Who Owns the Business?

IV. What is the Business Legal Structure?

B. Business Profile

I. What Products and/or Services Do You Offer?

II. Who are your Customers?

III. Where is the Business Located?

IV. How Many Employees Do You Have? Are they Full-Time or Part-Time?

V. Who Are Your Key Personnel? What Are Their Backgrounds?

C. Operations

I. How do you provide your products and/or services?

II. Historical Financial Summary

a. What Were Your Revenues and Expenses Over the Last Two Years?

b. What Was Your Net Profit or Net Loss Over the Last Two Years?

c. Analysis of Historical Financial Records Provided

III. Strategies & Implementation

a. What Strategies Will You Employ to Diminish Disruption in Operations?

b. What Strategies Will You Employ to Diminish Disruption in Operations?

D. Forecasts & Milestones

I. How Much Funding Are You Requesting?

II. How Will Loan Proceeds Be Used?

III. Proposed Funding Structure

IV. Milestones