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**Preliminary Information for Preparation of a Business Plan**

**Company Name** \_\_\_\_\_  
**Contact Name/Title** \_\_\_\_\_  
**Street Address** \_\_\_\_\_  
**City, State, Zip Country** \_\_\_\_\_  
**Phone / Cell Phone** \_\_\_\_\_  
**Fax** \_\_\_\_\_  
**Email** \_\_\_\_\_  
**URL** \_\_\_\_\_  
**Date Established** \_\_\_\_\_

**Industry** *(Please also include market segments targeted for sales if more than one)*

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Key Products / Services**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Stage of Development** *(Check one or more if applicable)*

- Start up
- Seed
- Proof of concept
- Prototype development
- Established Company seeking expansion
- Established Company seeking buyout/ exit

**Number of Employees**

- Current number
- If a startup, projected number of employees

**Business Description**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Team Members** (Name, position and 1-2 sentences on qualifications)

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**Capital Investment**

\_\_\_\_\_ Amount invested to date in company by Principal(s)  
\_\_\_\_\_ Amount of loans or debt  
\_\_\_\_\_ Amount of capital being raised

**Form of Funding Being Sought**

\_\_\_\_\_ Equity  
\_\_\_\_\_ Debt or SBA  
\_\_\_\_\_ Combination or convertible debt

**What will the funds be used for?**

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**Revenues (If start up, insert estimated annual revenue)**

\_\_\_\_\_ 2009 gross income and net income  
\_\_\_\_\_ 2010 gross income and net income to date  
\_\_\_\_\_ Projected revenue based on capital raise

**Available Business Plan Info**

\_\_\_\_\_ Do you have a draft Business Plan? If so, forward as a Word document  
\_\_\_\_\_ Do you have any existing information that can be emailed, including but not limited to any narrative describing business, resumes, research on market or competitors, marketing plan and otherwise?  
\_\_\_\_\_ Are existing financial statements or forecasts available in Excel or other format that can be forwarded?

**Confidentiality or Non Circumvention Agreement**

\_\_\_\_\_ Would you like to executive one to send details beyond the info on this form?

If yes, then send yours with this form, or send form and request ours.

**Miscellaneous (Yes or No)**

\_\_\_\_\_ Do you have any exclusive or non-exclusive Finder's Fee Agreement with any other firm(s)?

If yes, list the firm(s) and whether agreement is exclusive or non-exclusive

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