



Description of the Business

- Legal name
- Legal structure
- All owners: name, addresses, phone numbers, roles, % owned
- Nature of business (specific)
- History of business (specific)

Management and Personnel

- Key personnel (positions and qualifications)
- Management expertise
- Professional services
- Workforce requirements
- Résumés of key personnel
- Organizational chart

Products or Services

- Describe product lines or types of service
- Explain materials and supply sources
- Method of production
- Quality and cost of product/service
- Comparison to competitors' products
- Advantage of your product/service
- Samples, if applicable
- Product literature/brochures, if applicable

Market Information

- Market area and trends
- Customers and potential new customers
- Competitors' names, location and size

Marketing Strategy

- Overall strategy
- Methods of advertising and promotion
- Sales methods p Pricing methods
- Terms of sale
- Methods of distributing products
- Customer service

Business Facilities

- Location
- Reason for site selection
- Age and condition
- Expansion opportunities

Benefits to the Community

- Existing jobs, by position
- Jobs to be created or retained
- Rehabilitation to the building
- Increased tax base

Summary of Future Plans

- Short and long range plans
- Note relocation plans
- Discuss future expansion

Please do not limit yourself to these suggestions. If you feel that there is additional information, perhaps unique to your business, industry or concept, please include it. This is particularly critical if it will provide us with a more complete understanding of your business. If you have any question, please contact your Regional Account Manager.