

II/ BUSINESS DESCRIPTION

1/General:

List the business name, location, mailing address, telephone, fax, e-mail and web site address.

2/Owners:

List each owner's name, business title, home address, telephone number, email address and social security number. Include a brief description of owners and managers (experience and credentials in running the business) and their ownership percentage of the business.

3/Legal Business Description:

Sole proprietorship, partnership, limited liability,

Purpose:

Describe the intent of your business

Business Status:

New/start up, ongoing, expansion, or buying a business. Include the date your business started or will start. If buying a business, include a detailed business history in this section.

Type of business:

□detail, wholesale, service, manufacturing, contracting, professional, importing/exporting

Reasons for starting, buying, or expanding business.

Goals:

Include both current and long-term projections.

Industry:

Talk about what's going on in your industry, including economic trends, outlook, growth patterns and forecasts. Keep this section short. Explain more fully in your Marketing section

Professional Relationships:

Include name, address, and telephone/fax numbers and email address for your accountant, attorney, banker, insurance agent, and professional advisor(s)

BUSINESS DESCRIPTION

General:

List the business name, location, mailing address, telephone, fax, e-mail and web site address.

Legal Business Description:

Sole proprietorship, partnership, limited liability, "C" or "S" corporation. List the state where the business is incorporated.

Purpose: Describe the intent of your business.

Type of business:

Retail, wholesale, service, manufacturing, contracting, professional, importing/exporting.

GENERAL

Name: MRJ Design
Address: 21 Longwood Drive, Orlando, Florida 32751
Phone: (407) 123-4567 Fax: (407) 123-4789
E-mail: smith@MRJ.com, Web Site: www.MRJ.com

OWNERS:

Bob Smith: 10 Brookfield Rd., Orlando, FL 32751
Phone: 407-456-7891 Social Security: 367-89-7088
Over 20 years of experience in creative management. Worked for several design firms. Mr. Smith owns 60% of the business.
Linda Jones: 96 Elm St., Orlando, FL 32751
Phone: 407-567-1234 Social Security: 234-56-7891
Ten years of experience as manager of large marketing communications department within Fortune 1000 corporation. Ms. Jones owns 40% of the business.

LEGAL STATUS: Florida S Corporation

PURPOSE: Produce superior marketing communications material for other businesses.

STATUS: Start-Up.

BUSINESS TYPE: Service

PRODUCTS AND SERVICES: Graphic design, illustration, and artwork production. Other services, supplied by vendors/suppliers, include writing, photography, printing, and mailing.

REASONS: Both partners have over 30 years of industry experience that will be put to profitable use in our own firm. The demand for graphic communications is ...etc.

Owners:

List each owner's name, business title, home address, telephone number, email address and social security number. Include a brief description of owners and managers (*experience and credentials in running the business*) and their ownership percentage of the business.

Business Status:

New/start up, ongoing, expansion, or buying a business. Include the date your business started or will start. *If buying a business, include a detailed business history in this section.*

Reasons for starting, buying, or expanding business.

Goals:

Include both current and long-term projections.

GOALS:

CURRENT: Bring to profitable status that will equal or exceed current income levels. Create relationships with clients. Build ...etc.

LONG-TERM: In four years, we will have 50-100 clients. Hire administrative person ... etc.

Industry:

Talk about what's going on in your industry, including economic trends, outlook, growth patterns and forecasts. Keep this section short. Explain more fully in your Marketing section.

INDUSTRY:

100 design firms and designers exist in our territory. Advertising agencies (about 235) are also competitors but their specialty is not design. Many companies have relocated to Orlando so the demand for our services is growing. The number of start-up companies numbered 6,000 last year...etc.

PROFESSIONAL RELATIONSHIPS:**ACCOUNTANT:**

Larry Stuart, CPA, 123 Main St., Winter Springs, FL 32781. Ph: 407-678-9012, Fax: 407-678-7890

ATTORNEY:

Linda Johnson of Johnson and Smith, 456 Elm St., Winter Park, FL 32789.
Ph: 407-234-5678, Fax: 407-345-6789

BANKER:

John Nelson, Heritage Bank, 678 Oak St., Orlando, FL 32908. Ph: 407-123-4567. Fax: 407-0987-6543.

INSURANCE AGENT:

Linda Doe, Doe Insurance, 321 Grove Ave., Winter Park, FL 32789. Ph: 407-432-7654. Fax: 407-876-5432

PROFESSIONAL ADVISORS:

Claire Velleca, Velleca Consultants, 1 Park St., Orlando, FL 32701 Ph: 407-222-1456, Fax: 407-419-1989

Professional Relationships:

Include name, address, and telephone/fax numbers and email address for your accountant, attorney, banker, insurance agent, and professional advisor(s).

BUSINESS DESCRIPTION

GENERAL

Business name _____
Location _____
Mailing address _____
Phone number _____ Fax _____
Tax identification number _____
E-Mail address _____
Web Site address _____

PROFESSIONAL RELATIONSHIPS

Include name, address, and telephone/fax numbers for your:

Accountant _____

Attorney _____

Banker _____

Insurance agent _____

Professional advisor(s) _____

OWNERS

Provide the following information for each principal in the company.

Name _____

Business title _____

Home address _____

Telephone number _____

Social security number _____

Include a brief description of owners and managers (*experience and credentials in running the business*) and their percentage of ownership

Legal Business Description (sole proprietorship, partnership, corporation, etc.) _____

State What state is your business organized in? What states will you operate in? _____

Type of business (retail, wholesale, service, manufacturing, contracting, etc.) _____

Business Status New, ongoing, expanding, or buying a business _____

Date your business started or will start _____

To Do Done

Reasons

for starting, buying, or
expanding business.

To Do Done

Products and Services

Provide a summary.

To Do Done

Goals

Current goals (within the next year)
Long-term (over the next five years)

To Do Done

Industry

Provide a brief summary of what's going
on in your industry. Include economic trends,

To Do Done



KEEP TRACK

Use this check box as a
reminder system. Some
answers will be short

THANK YOU

FOR ATTENTIONS

