

Business Plan Intake Form

Company & Inquiry Information

Funding Request Date _____

Legal Entity/DBA _____

Industry Sector _____

industry Description _____

Street Address _____

City _____ State _____

Postal Zip Code: _____

General Business Information

Contact First Name _____ Contact Last Name _____

Title _____ Telephone _____

E-Mail _____ Website _____

Twitter _____ Facebook _____

Other Social Media _____

Company Stage

Start- Up _____ Time in Business _____

Design Phase _____ Investor Opportunity _____

Current Investment Amount: _____

Investment Source: _____

Funding Request: _____

Financial Potential: _____

Business Plan Intake Form

Business Description

Business Information (Type of business)

Business History & Opportunity (What's your background/story)

Products/Service Description

Current Status & Goals

Mission/Vision

Marketing Plan

Target Marketing Goals

Advertising & Media (include budget)

Promotional Plan (include budget)

Business Plan Intake Form

Pricing Policy

Operations

Location _____

Facilities _____

Equipment _____

Suppliers & Inventor _____

Number of Employees _____

Management

Resumes or Biographies (Please attach and return with completed form)

Linked-In Profiles _____

Business Structure _____

Company Advisors _____

Other Important Information (Please list any additional relevant business information)
