

“SBA Business Plan Executive Summary”

Getting to “Yes”

August 22, 2019 at Brookdale Community College

The following **“SBA Business Plan Executive Summary”** has been provided for your use to develop a document that can be given to lenders. This document will summarize vital information about your business or project and give lenders an opportunity to better evaluate your loan request.

Bring several copies on August 22 so you can hand out a copy to each lender.

CONTACT INFORMATION

Name: _____ Title: _____

Phone Numbers: Business _____ Cell: _____

BUSINESS INFORMATION

Business Name: _____

Business Address: _____

Date Business Established: ____ / ____ / ____

Legal Structure: Sole Proprietorship Partnership Corporation S-Corp LLC none

Business Product/Service: _____

Key Individuals of the Business (Owners/Officers/Managers/Member, etc & % of ownership interest if any)
Name _____ Office/Position Held _____ % of ownership _____

LOAN INFORMATION

Loan Amount: \$ _____

Type of Loan(s): Cash _____ Line of Credit _____ Mortgage _____

Purpose of Loan: _____

Impact Loan will have on the Business: _____

Use of Loan Funds (dollar break down for major expenditures: property, equipment, inventory, renovations, vehicles, working capital, etc.)

Collateral Available for the Loan: _____

Loan required by: ____/____/____

How will the loan be repaid: _____

Other Considerations: _____

Form Provided by:
MOSBDC (Monmouth Ocean Small Business Development Center) aka ASBDC New Jersey at Brookdale Community College E-mail: mosbdc@brookdalecc.edu