



Business Name: _____

Background & History of principals and company:

Describe the products/services the business offers and what they do for the customer. Please provide any company brochures or literature.

What geographic/demographic areas does business service? Who are your customers and where are they located, how big is the market? What is your current and desired future market share?

Does any customer represent greater than 15% of sales?

YES

NO

If "Yes," provide detail about the customer including general information (Sales volume, public/private, years in business, etc.) and how long you have been servicing this customer.

Who are your primary competitors?

<i>Competitor</i>	<i>Location</i>	<i>Your Competitive Advantage</i>

How do you market your product/services? (include information about distribution channels, suppliers including concentrations, seasonal swings, etc.)

Describe your vision for the company over the next 2 - 3 years... 8 - 10 years? (i.e. growth plans, changes in customer base, future capital expenditures, current capacity vs. future, management structure. Also describe your management succession plan should you or a key member of your management die, became disabled/and or unable to work.