

Business Profile

Your company's legal name:		
Company trade name (if applicable):		
Address:		
Telephone:	Fax:	E-mail:
Start-up date of your business:		Number of employees:
How is your business structured?		
Sole proprietorship <input type="checkbox"/>		
Partnership <input type="checkbox"/>		
Corporation <input type="checkbox"/>		

Who owns your business: owners and key management personnel

List of Key Personnel/Principals

Name	Title/ Responsibilities	% of business held	Years in business

Describe your management team. What are your/their qualifications, strengths and weaknesses?

Professional advisors: your legal and accounting firms (last five years)

Accounting firm name	Location	Name of accountant
1.		
2.		
Law firm name	Location	Name of lawyer
1.		
2.		



Key person life insurance: What coverage do you have?

Succession planning: What plans have been made in the event of owners/key management's death, illness or retirement?

Other related/associated companies/joint ventures: If you or your company are involved with other businesses, list below and provide an organizational chart outlining the relationship between all parties involved.

Financial history highlights for the past three years

	20_	20_	20_
Sales			
Net earnings			
Total assets			
Total debt			
Owner's equity			

Comments on your company's financial history:
