**Shape

Description automatically generatedBusiness Case Summary for Existing Businesses**

**What is the Business?**

Describe your business. What do you sell? How long have you been in business? What has been happening in your business thus far? What are your new plans?

**Team and Key Roles**

Who is on your team, give some credentials, why are you & they suited for the business?

**Your Customers and Products**

Describe your products or services? What need do they solve for the customer?

Where are most of your customers located?

**The Competition**

List all the places where your customers could buy similar products and services to what you sell. How does your business differentiate itself from the competition?

**Sales Process**

How successful have you been with sales and customer service? Do you have repeat customers? Do you have a good reputation in your industry, and community? Do customers enjoy dealing with you?

**Sales Forecast**

What is your estimate for how many products and services you can sell each day, each week, each month?

Use these monthly sales totals on your 12-month cashflow forecast.

**Profit Margins**

What is your retail and /or wholesale price for each product and service? What are the costs to produce those products and services, and the profit margins on each of them.

**Expenses**

What are your monthly operating expenses? List out everything you will need to pay out each month.

**Cash Flow Forecast**

Include a 12-month cashflow forecast showing estimated sales and expenses. Also demonstrate the seasonal fluctuation in sales and expenses throughout the year, don’t show every month with the exact same sales values, as there are likely months where sales are high and some where sales are very low.

**Marketing Highlights**

What does your Marketing Plan look like? Has it been effective? List all the ways customers find out about you. List your website and social media platforms.

**Milestones**

What steps do you need to take to complete this next phase of your business? List your milestones for the next few months. What do you need to do to make these milestones a reality?

**Loan Request:**

How much are you asking for? What specifically will you be spending this money on? List everything needed.

**What is the ownership structure of your business?**

Will you be a sole proprietor, a partnership or corporation? If a corporation list all your shareholders.

**Past Financial Statements**

Include at least the past two year’s financial statements as well as year to date statements.