# Business Plan Questionnaire

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| Date: |  |
| Legal Business Name: |  |
| Address: |  |
|  |  |
| Phone Number: |  |
| Email Address: |  |
| Name of Contact: |  |

1. What type of company is your business? What is the nature of its products or services? What is the legal structure (sole proprietorship, LLC, etc.)? What is its EIN? What are the backgrounds of the management and owner?

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1. Do you own or rent any facilities. Are you in need of a location?

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1. Does your company own intellectual property?

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1. What type of funding do you currently have? What funding do you need? Include total amount invested by the owner.

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1. What is your estimated annual budget? Please include a detailed report divided into separate areas, such as inventory, real estate, property, equipment, staff, and any other expenses.

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1. If you are a functioning business, please include your last two years' tax reports.

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1. What do you know of your competition? What companies specifically market similar products or services to yours, including general and direct competition?

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1. Are there sales involved in your company? How are sales acquired? Do you charge sales tax?

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1. What is the intended market for your product or service? Why do you feel it is needed? What are your intended demographics in in what geographical area(s)? Why do you believe your product is unique, especially if you are entering a saturated market? What do you believe your market share will be? If your company already exists, what is your current market reach?

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1. What is your marketing and advertising plan? Please provide a detailed strategy.

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1. What type of customer service does your business need? What is your plan for fulfilling this need?

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1. How are you planning to set the price for your goods or services?

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1. If you are a new company, what are your projected startup costs? Please list all in full detail, grouping them into applicable categories.

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1. Please detail your assets and liabilities.

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1. What is your projected growth over the next 2-5 years? Provide reasons as to why you picture this growth.

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1. How many employees do you have? What level of employee growth do you foresee?

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1. For existing companies, what problems have you encountered and how do you intend to fix or overcome them?

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1. Please provide any additional information you feel is relevant.

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