

BUSINESS QUESTIONNAIRE

Please answer the questions below for business history assessment. If information is available online via a website or other data source, please list it.

Business Website Address (if applicable): _____

History and Description of Business — please include: date of ownership; if not the original owner, when you took over; purchase price (if applicable); current employee count; expansion goals; and whether the company outsources any work.

Describe all products / services offered (nature of business):

Management — list all key managers and answer the questions below (attach resume if available).

Owner(s) role & responsibility:

Prior industry experience:

Prior educational experience:

Management succession plan — please advise who can assume role & responsibility when the owner is absent:

Please list any key customers (sales from repeat customers, if applicable) and direct (local) competitors:

What makes your business stand out (pricing, staff, responsiveness, market share, etc.):

How will the direct use of proceeds help grow & expand your business: