

<Business Name>

Executive Summary

Written / Revised: <Date>

<This document often appears to stakeholders without you - like sending it to your banker prior to meeting with them - aka this document should be able to stand on its own feet without your added verbal explanation>

Summary of Project

<2-3 sentences of high level description of what the project is creating>

Management Team

<Name 1>

<Professional Overview, and position in this project, several paragraphs>

<Name 2>

<Professional Overview, and position in this project, several paragraphs>

<Name 3>

<Professional Overview, and position in this project, several paragraphs>

Business Origin Story

<This personalizes your venture, especially to stakeholders who may not have bought in yet>

Products & Services

<A couple paragraphs about the high level products and services the finished project will be able to provide>

Customers

<Who do you expect to be the customers for your future operation. What are the specifics of what those people are looking for that your completed project will be able to provide>

Marketing & Sales

<A few sentences describing your approach to marketing and building brand awareness. Examples: social media, paid ads on social media, newspaper, radio, tv, etc.>

Financing Requirements

<high level categories of the project funding needed>

Examples

Equipment - \$600,000

Inventory - \$100,000

Working Capital - \$100,000

Building Remodel - \$100,000