



Initial Assessment for Existing Businesses

Owner(s) Name(s):

Business Name:

Legal form of business organization:

Business Address:

Business Phone Number:

Business Fax Number:

Type of Business:

Business Email:

Date started/purchased business:

SIC/NAIC Code:

Provide a brief history and description of your business in 25 words or less:

What anticipated changes do you plan to make within the next year?

What are your business strengths and weaknesses with respect to marketing?

What are your business strengths and weaknesses with respect to management?

What are your business strengths and weaknesses with respect to finance?

Is your business's cash-flow positive? Yes No If no, why not?

List all products or services you offer your customers:

Describe your current customers including any major customers:

List and describe current competitors, including their strengths and weaknesses:

What is your business's competitive advantage?

Place a check mark in the blanks that best describes you and key partners or managers in your company:

	Adequate Knowledge	Counseling Needed	Training Needed
Accounting and Bookkeeping			
Computer Experience			
Financial Management			
Marketing and Promotion			
Operations			
People Management			
Personnel Policies			
Planning			
Pricing			
Sales			
Tax			
Other:			
Other:			

Do you need financing for your business? __No __Yes

If yes, please please provide a copy of your credit report. If you don't have a credit report, please order one from one of the three national credit bureaus listed. <http://www.experian.com> (888-397-3742; <http://www.transunion.com> (800-888-4213); <http://www.equifax.com> (800-685-1111)

Describe your credit history (also indicate the credit history of any partners):

- _____ Excellent
- _____ Good, past issues have been corrected.
- _____ Fair, I need to take care of some issues.
- _____ Poor
- _____ Don't Know

Have you had a personal or business bankruptcy in the past 5 years? No Yes If yes, why?

Have you been or are any other organizations or resources currently assisting you? No Yes

Please provide copies of your year-end financial statements for the past two years.

Please provide copies of your current financial statements.

Please provide copies of your business tax returns for the past two years.

Please provide a copy of your credit report if you need financing for your business.