Business Name

Date:
Business Name

Primary Business contact Name

Street Address

City, State, Zip

Work Phone:

Home Phone:

Cell Phone:

Fax:

Email:

Website:
Non-Disclosure & Confidentiality Agreement

The undersigned reader hereby agrees that all financial and other information provided by __________________________ in this plan is confidential and will not be disclosed without expressed written consent. It is acknowledged that the information furnished in this business plan is confidential in nature, other than information which is in the public domain through other means, and that any disclosure or use of the same by the reader, is subject to enforcement by a court of law.

_________________________  __________________________
Date                                                                 Signature

This is a business plan and does not imply an offering of securities.

Business Plan Developed By:

UMD CENTER FOR ECONOMIC DEVELOPMENT
UNIVERSITY OF MINNESOTA DULUTH
Driven to Discover

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Executive Summary

Briefly Describe Your Business: (One paragraph summary)

Legal Organization: (LLC, Sole Proprietor, S Corporation)

Ownership: Enter name(s) of owner(s)

Funding Request:

Business Description:

Business Description: (Provide a detailed description of your products, services, organization, operations and management)
**Vision:** What are your long-term aspirations?

**Mission:** Why do you exist?

**Goals**

*Ensure that goals are S.M.A.R.T. – Specific, Measurable, Achievable, Realistic, and Timed*

**Short-Term Goals** (less than one year):

**Long-Term Goals** (one year or more):

**SWOT**

*Within the Company*

**Strengths:**

**Weaknesses:**
Outside the Company

Opportunities:

Threats:

Industry Characteristics & Trends

Customer

Demographics: Who are your customers? (average age, income, education, etc.)

Psychographics: What are your customers’ personalities, values, attitudes, interests, and lifestyles?

Geographic Area: What area do you serve?

Competitors

*Provide top 3 competitors with strengths and weaknesses for each competitor, feel free to add more.

<table>
<thead>
<tr>
<th>Business name:</th>
<th>Strengths:</th>
<th>Weaknesses:</th>
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Sales Projection Supporting Data

Potential Customer Base:

National Trends:

Competitive Advantage:

Share of existing market to capture:

Marketing Plan (Describe how you will use the different channels and why)

Social Media:

Customer Loyalty Program:
Website:

Internet Advertising:

Blog:

Newsletter:

Direct Mail:

Radio:

Newspaper:

Print Media:

Television:

Support Professionals

CPA:

Attorney:

Bank:

Insurance:
SBDC Consultant:

Other:

Financial Projections Summary and Assumptions

*See spread sheets