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Preliminary Information for Capital Investment/Funding

Company Name _____

Contact Name/Title _____

Street Address _____

City, State, Zip Country _____

Phone / Cell Phone _____

Fax _____

Email _____

URL _____

Date Established _____

Industry *(Please also include market segments targeted for sales if more than one)*

Key Products / Services

Stage of Development *(Check one or more if applicable)*

- Start up
- Seed
- Proof of concept
- Prototype development
- Established Company seeking expansion
- Established Company seeking buyout/ exit

Number of Employees

- Current number
- If a startup, projected number of employees

Business Description *(Should include value proposition)*

Team Members (Name, position and 1-2 sentences on qualifications)

Capital Investment

_____ Amount invested to date in company by Principal(s)
_____ Amount of loans or debt
_____ Amount of capital being raised

Form of Funding Being Sought

___ Equity
___ Debt
___ Combination or convertible debt

What will the funds be used for?

Revenues

_____ 2009 gross income and net income
_____ 2010 gross income and net income to date
_____ Projected revenue based on capital raise

Business Plan (Yes or No)

___ Is Executive Summary available in Word?
___ Is complete Business Plan available in Word?
___ Are detailed forecasts available that can accompany the Business Plan available in Excel?

Confidentiality or Non Circumvention Agreement

___ Would you like to executive one to send details beyond the info on this form?

If yes, then send yours with this form, or send form and request ours.

Miscellaneous (Yes or No)

___ Do you have any exclusive or non-exclusive Finder's Fee Agreement with any other firm(s)?

If yes, list the firm(s) and whether agreement is exclusive or non-exclusive
