



# SMALL BUSINESS PLAN TEMPLATE

LOANS UP TO \$250K

Use this form if you are requesting more than \$50,000 and up to \$250,000.  
Please be as specific as possible, but you may use estimates if exact numbers are not available.

Borrower name(s)

Business name

Phone / email

Business location

Legal structure:

- Sole proprietor     LLC     Corporation     Partnership     Other

Type of request:

- Startup     Existing business     Expansion     Business purchase

## 1. BUSINESS OVERVIEW

Provide a simple overview of the business and where it is today.

When did the business start?

What products or services do you offer?

What stage is the business in today?

What are your goals over the next 1-3 years?

Describe the business, its purpose, and why there is demand for it.

## 2. LOAN REQUEST AND PROJECT COST

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Explain the financing request clearly.

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Loan amount requested

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Total project cost

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Owner cash injection, if any

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Other financing sources, if any

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What will the loan be used for?

- Equipment
  - Inventory
  - Working capital
  - Vehicle / fleet
  - Real estate
  - Leasehold improvements
  - Business acquisition
  - Refinance debt
  - Startup costs
  - Other
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Provide a short breakdown of the project and use of funds.

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## 3. CUSTOMERS, MARKET, AND COMPETITION

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Tell us who you serve and why the business can compete.

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Who are your target customers?

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What cities, counties, or regions do you serve?

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How large is the opportunity in your market?

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Who are your main competitors?

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Why will customers choose your business?

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What makes your business different or better?

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## 4. SALES AND MARKETING

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Explain how the business gets and keeps customers.

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How do customers find you?

- Word of mouth / referrals
  - Facebook / social media
  - Website / online search
  - Walk-in traffic
  - Wholesale / contracts
  - Community events
  - Advertising
  - Other
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How do you set prices?

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What are your main sales channels?

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What are your expected monthly sales in year 1?

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What are your expected monthly sales in year 2?

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Describe your marketing plan and growth strategy.

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## 5. OPERATIONS AND STAFFING

Describe how the business operates day to day.

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Business location and facility needs:

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Hours of operation:

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Current number of employees:

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Expected number of employees after funding:

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Key equipment needed:

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Main suppliers or vendors:

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Describe your day-to-day operations from sales through delivery of the product or service.

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## 6. MANAGEMENT AND SUPPORT TEAM

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Tell us who is responsible for running the business.

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Owner / manager experience

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Industry background

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Bookkeeper / accountant, if any

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Attorney, consultant, or advisor, if any

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Describe the management team and why they are qualified to run the business.

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## 7. FINANCIAL INFORMATION

*Attach supporting financials if available. This section helps us understand your projections.*

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Last full year sales (if existing business):

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Year-to-date sales:

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Estimated gross margin or markup:

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Estimated monthly operating expenses:

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Existing monthly debt payments:

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Estimated monthly payment for this loan:

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What assumptions did you use for your sales projections?

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Explain how the business will repay the loan.

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## 8. COLLATERAL AND OTHER ASSETS

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List business or personal assets that may support the request, if available.

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Assets available to discuss

- Real estate
  - Equipment
  - Vehicles
  - Inventory
  - Accounts receivable
  - Savings / cash
  - Other
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Please list any major assets, collateral, or additional sources of repayment.

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## 9. ADDITIONAL INFORMATION

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Use this section for anything else that will help us understand the request.

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Please provide any additional details, risks, opportunities, or context.

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### *Borrower Certification*

- I certify that the information provided is true and complete to the best of my knowledge.
- I understand that First Southwest Community Fund may request supporting documents.

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Borrower Name(s)

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Date

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Signature

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