



SMALL BUSINESS PLAN TEMPLATE LOANS UP TO \$50K

Use this form if you are requesting a loan up to \$50,000. Please answer as clearly as you can. Estimates are okay. If you do not know an answer, write your best estimate or note that you need help.

Borrower name(s)

Business name

Phone / email

Business location

Type of request:

- Startup Existing business Expansion Business purchase

1. ABOUT THE BUSINESS

Tell us what your business does in plain language.

What does your business sell?

When did the business start (or when will it start)?

What problem does the business solve?

Who owns the business?

Describe your business in a few sentences.

SMALL BUSINESS PLAN TEMPLATE

2. LOAN REQUEST

Tell us how much you need and what you will use it for.

Loan amount requested

How much money are you putting in, if any?

If this is a purchase, what is the total purchase price?

What will the loan be used for?

- Equipment
- Inventory
- Working capital
- Vehicle
- Repairs / improvements
- Refinance debt
- Business purchase
- Other

Please briefly explain how the loan funds will be used.

3. CUSTOMERS AND SALES

Keep this simple. We want to understand who buys from you and how you make money.

Who are your main customers?

Where are your customers located?

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How do customers find you?

What do you charge most often?

Busy season / slow season

Why will customers choose your business instead of another option?

4. EXPERIENCE AND OPERATIONS

Tell us why you are prepared to run this business.

Owner's related work experience

Licenses or certifications, if any

Business hours:

Number of employees:

Key suppliers or vendors:

Who helps you run the business and what do they do?

SMALL BUSINESS PLAN TEMPLATE

5. SIMPLE FINANCIAL SNAPSHOT

Round numbers are okay. Use monthly estimates unless noted otherwise.

Current monthly sales (or expected sales):

Current monthly business expenses:

Estimated monthly owner pay:

Other household income, if any:

Estimated monthly loan payment you can afford:

How will this business make the loan payment each month?

If sales are lower than expected, what is your backup plan?

6. ADDITIONAL INFORMATION

Use this section for anything else that would help us understand your request.
Please list any important notes, existing debts, major assets, or additional context.

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.

Borrower Name(s)

Date

Signature