



**Directions-** Complete all sections prior to submitting your business plan. You can start this and come back to it at any point. Bullet point format is appropriate and grammar and spelling are not judged or scored. You may complete this form in English or Spanish

Name:

Phone Number:

Email:

<p><b>Name of Business:</b> Is this a startup or an existing business? If an existing business state the start up date.</p>	
<p><b>Identity/ Mission Statement/ Reason for business</b></p>	<p><b>Problem/ need our business provides</b></p>
<p><b>Our solution/ What we offer</b></p>	<p><b>Target market/ who we service (will service)</b></p>
<p><b>The current competition</b></p>	<p><b>Revenue streams/ money coming in</b></p>



<p><b>Marketing activities/ advertising</b> How will you market your product/service?</p>	<p><b>Expenses</b></p> <p>One Time Expenses</p> <p>Monthly/ or Annual Expenses</p> <p>Labor Costs</p>
<p><b>Team and key roles/ members/ future employees</b></p>	<p><b>Milestones/ how will you know how you are doing? Measurable Goals.</b></p>
<p><b>Motivation for starting/ building your business</b></p>	<p><b>Focus area for the loan</b></p> <p>Use of Funds:</p> <ul style="list-style-type: none"> <li>● Breakdown of how the loan funds will be used</li> <li>● Explanation of how the funds will benefit the business</li> </ul>
<p><b>References:</b></p> <ul style="list-style-type: none"> <li>● Professional references, if applicable</li> <li>● Supplier or customer references</li> </ul>	<p><b>Information</b></p> <ul style="list-style-type: none"> <li>● Owner's/Entrepreneur's Name</li> <li>● Personal Address/ business address</li> <li>● Email</li> <li>● Phone number</li> </ul>



<p><b>Current work situation</b></p> <ul style="list-style-type: none"><li>● Currently working at the business</li><li>● Current Employment</li></ul>	<p><b>Business ownership to show alignment to the Mission Statement of The Auntie Isabell Foundation</b></p> <p>Identify the following underrepresented communities with which you identify :</p> <ul style="list-style-type: none"><li><input type="checkbox"/> Race</li><li><input type="checkbox"/> Color</li><li><input type="checkbox"/> Age</li><li><input type="checkbox"/> Ability</li><li><input type="checkbox"/> Sex (including gender identity and sexual orientation)</li><li><input type="checkbox"/> Socioeconomic Status</li><li><input type="checkbox"/> Familial Status</li><li><input type="checkbox"/> Religious Affiliation</li></ul>
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**Process-**

By submitting this business plan I understand that I am starting the process of applying for a low interest loan through the Auntie Isabell Foundation. I understand that the process includes:

- Submission of application (a helpful website is score.org)
- An initial interview to review and discuss the submitted application
- Completing free 5 hours of Small Business Mentorship through SLO SBDC
- Submission of a new revised business plan/ business license etc.
- A follow up interview after the completion of the 5 hours of mentorship and submission of a new revised business plan
- Agreement of loan amount and the terms of payment schedule. Understanding that ALL payments go toward helping the next recipient of the Auntie Isabell Foundation business loan.
- Award of loan or advisement on how to improve and apply again or be referred to KIVA



## Confidentiality Agreement

I acknowledge that any information provided by me in this business plan, other than information that is in the public domain, is confidential in nature.

Signature

\_\_\_\_\_  
Name (typed or printed)

\_\_\_\_\_  
Date

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