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The following information will enable us to serve you more effectively and comply with the terms of our sponsors and funding agencies. All Virginia SBDC client information is always held in strict confidence.

1. What is your business or business idea? (i.e., major products/services sold or to be sold)
2. Starting Date of the business: \_\_\_\_\_
3. Why do you think there is a need for your product or service?
4. Who are your customers? (i.e., age, gender, income, etc). Why will they want to buy your products/services?
5. Who are your competitors and what are their strengths and weaknesses?
6. What competitive edge do you have over your competition?
7. How are you going to promote your business? (i.e., coupons, mailings, press releases)
8. What experience or skills do you have that would help you to operate the business successfully?
9. What key challenges concerning your business do you want to address with the Mason SBDC staff?
10. Balance Sheet Information (estimates/approximations are fine):  
 Assets \$ \_\_\_\_\_ Liabilities \$ \_\_\_\_\_ Balance Sheet Net Worth \$ \_\_\_\_\_  
 This information reflects the situation as of \_\_\_\_\_ (date).
11. Income Statement Information for the \_\_ quarter / \_\_ year ending \_\_\_\_\_:  
 \$ \_\_\_\_\_ Gross sales or receipts                      \$ \_\_\_\_\_ Cost of goods sold  
 \$ \_\_\_\_\_ Operating expenses                              \$ \_\_\_\_\_ Profit or loss  
 \$ \_\_\_\_\_ Total payroll (as reported to VEC)    \$ \_\_\_\_\_ Owner(s) compensation (include fringe benefits)
11. If you need help financing the business, what is your estimate of the amount needed?
  - a. How would you describe your credit rating? \_\_\_\_ Poor \_\_\_\_ Fair \_\_\_\_ Good \_\_\_\_ Excellent
  - b. If you have filed for bankruptcy, in what year did you file? \_\_\_\_\_

You may attach relevant documents that will help us serve your needs. These might include financial statements (actual and/or pro-forma), business plan, resumes of management team, etc.

**MASON SBDC USE ONLY:**

Entered into CIC system on (date) \_\_\_\_\_ by (name) \_\_\_\_\_.