

**Loan Proposal Prepared
Especially for
[Bank Name]**

[Insert Your Logo Here]

[Your Company Name]

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Term Sheet

Amount

[amount of loan requested]

Type of loan

Business Line of Credit

Interest rate

[Desired interest rate]

Method of repayment

[how you will repay it]

Collateral

[any collateral you have to pledge]

Personal guarantors

[your name if you're giving a personal guarantee]

Relationship with Lender

[Describe your relationship with the bank (how many accounts you have, for how long, clients/investors who work with the bank, etc.)]

Remove this section if you have no relationship with the bank.

Executive Summary

Brief Financial Description of Business

[Your Company is in the business of...]

[Describe the founder and industry]

Use of Proceeds

[Why do you need the money? What will it be used for?]

Management Experience with [Your Industry]

[Describe your experience in the industry]

Credit Report

A personal credit report for [Your Name] is provided in this section.

Photos of Operation

[insert photos of your business. If no active business yet, photos of the founders and management team]

Board of Advisors

John Smith
President and CEO
John Smith Enterprises
11111 E. 111th St.
Bixby, OK 74008
555-555-5555

John Smith 2
President and CEO
John Smith Enterprises
11111 E. 111th St.
Bixby, OK 74008
555-555-5555

John Smith 3
President and CEO
John Smith Enterprises
11111 E. 111th St.
Bixby, OK 74008
555-555-5555

John Smith 4
President and CEO
John Smith Enterprises
11111 E. 111th St.
Bixby, OK 74008
555-555-5555

Significant Professional Relationships

John Smith
President, Accounting firm
11111 E. 111th St.
Bixby, OK 74008
555-555-5555

[Describe why you chose this accountant]

John Smith
President, Legal firm
11111 E. 111th St.
Bixby, OK 74008
555-555-5555

[Describe why you chose this attorney]

Acknowledgements

[Post images of newspaper articles, awards, etc. that you have earned or your business has earned – anything you can to show you have been recognized as a successful/impactful person in your industry or community]

Financial Statements

A personal financial statement is provided for [Founders].

Furthermore, a cash flow statement is provided for [YOUR BUSINESS].

[Explain any potential problems or negative points here upfront]

Personal Tax Return

[Insert tax returns for the last 3 years]. Explain any negative points (losses, etc.) here upfront.
The more you explain upfront, the more the lender will trust you.

Business Plan
[insert business plan]

[Your Company Name]

EMPLOYEE HANDBOOK

Effective Date [Date]

Table of Contents

[insert table of contents for your employee handbook]

Please ask if you would like to see a copy of the full Employee Handbook.

[your company name]

Employee Training Program

TRAINING PROGRAM SUBJECT AND SCHEDULE

[Create outline of your employee training plan]

A full copy of the Training Program is available upon request.

Want More Free Business Training?

Join us at www.TCKPublishing.com for more free training on how to promote, grow, and improve your business online.