

THE BORROWER MUST PROVIDE THE REQUIRED ITEMS BELOW IN ORDER TO RECEIVE APPROVAL FOR FUNDING

- 1. A BUSINESS PLAN WITH A TABLE OF CONTENTS**
- 2. A WELL WRITTEN EXECUTIVE SUMMARY – NO MORE THAN 2 PAGES**
(The Executive Summary Must Be Included Inside The Business Plan)
- 3. A TEN (10) YEAR (MONTHLY) FINANCIAL ANALYSIS – XL SPREAD SHEET**
- 4. A PROOF OF FUNDS (POF) (IF NOT USING BRIDGE LENDER)**

Executive Summary Must Contain:

- *The Opportunity**
- *Target Market**
- *Business Model**
- *The Leadership**
- *The Competition**
- *Financials**
- *Future Goals**
- *Exit Strategy**

ALL OF THE ABOVE MUST BE ON THE FIRST TWO PAGES! THERE ARE NO EXCEPTIONS TO THIS RULE!

Please CONFIRM THE FOLLOWING Before Submitting Documents

A. That the Business Plan - HAS A Table Of Contents

B. Executive Summary – HAS 2 PAGES AND CONTAIN THE FOLLOWING

The Opportunity

Target Market

Business Model

The Leadership

The Competition

Financials

Future Goals

Exit Strategy

C. The 10 Year Monthly Financial Analysis – XL SPREAD SHEET FORMAT

D. The POF (Proof of Funds) HAS BEEN INCLUDED

E. AN INDEX HAS BEEN ADDED FOR ALL THE ATTACHMENTS!!!

Lender Does Not Want Unidentified Attachments.

F. Both Passports and Drivers Licenses Must be Included in the Business Plan.

G. The NCND FEE AGREEMENT HAS BEEN Signed By The Borrower.

GENERAL INFORMATION ABOUT AN EXECUTIVE SUMMARY

Writing An Executive Summary

An Executive Summary of a business plan is an overview. Its purpose is to summarize the key points of a document for its readers, saving them time and preparing them for the upcoming content.

Think of the executive summary as an advance organizer for the reader. Above all else, it must be clear and concise. But it also has to entice the reader to read the rest of the business plan.

Because it is an overview of the entire plan, it is common to write the executive summary last (and writing it last can make it much easier).

FINALLY

- **Keep it short - No More Than Two Pages Long.** Resist the temptation to pad your business plan's executive summary with details (or pleas). The job of the executive summary is to present the facts and entice your reader to read the rest of the business plan, not tell him everything.

**GROUND-UP CONSTRUCTION / BUILD PROJECTS
NEEDED ITEMS TO SUBMIT**

- 1. ARCHITECTURAL DRAWINGS & SPECIFICATIONS**
- 2. SITE PLAN**
- 3. SIGNED AIA DESIGN/BUILD
CONSTRUCTION CONTRACT**
- 4. CORPORATION DOCUMENTATION**
- 5. ENVIRONMENTAL IMPACT ANALYSIS**
- 6. SOIL TEST (ESPECIALLY ON COASTAL SITES)**
- 7. CONTRACTOR & BIO**
- 8. DRAW SCHEDULE**