

*The highest form of
charity is to help people
help themselves...*



HEBREW FREE LOAN SOCIETY OF GREATER PHILADELPHIA

Business Loan Application: Business Plan Template

Please provide a business plan that includes at least the following information.

Brief Summary

- Type of Business.
- Background and qualification of owner(s).
- Investment Capital required.
- Expected Annual Income.

Business Goals and Objectives

- List objectives, both short-term and long-term.

Definition of the Market and Competition

- List the Target Market and what competition, if any, exists.

Description of Products and/or Services Offered

Organization and Management

- Employees and reporting structure.
- Legal structure. (Corporation, LLC, Sole Proprietorship?)
- Licenses: Are any required? If yes, what?
- Insurance: What insurance is proposed?

Marketing and Sales Strategy

- Sales strategy.
- Promotions.
- Business Location and Rent.

Financial Management

- What type of accounting software (or hand bookkeeping system) will be used?
- Estimate of start-up costs.
- Projected budget (income and expenses) and projected 3-year cash flow.

Overview of work to be done (approximately in order)

- List steps necessary to get business operational or to complete the upgrade.