

# UPS Capital Business Credit<sup>SM</sup>

## Business Plan Worksheet



Loan Application Identifiers - Applicant Company Information	
Applicant Company Name	Applicant Company Phone ( ) -
<b>The document serves as a summary of the business you plan to pursue. We ask that you please provide a copy of your business plan to ensure a better understanding of your business. Additional assistance with a complete business plan is available on the US Government Small Business Website: <a href="http://www.sba.gov/starting_business/planning/basic.html">http://www.sba.gov/starting_business/planning/basic.html</a></b>	
<b>Goals and Objectives</b> – Describe the service or product the business provides and the role the company serves in the industry:	
<b>Business History</b> – Summarize the history of the business:	
<b>Target Market</b> – Describe your customer and how your products or services fill this need?	
<b>Describe your Location</b> (i.e., ease of access, location of competitors, etc.)	
<b>Sales and Marketing</b> – Describe how you plan to reach your customer? (Describe your advertising plan, sales activities, etc.)	
<b>How will this loan assist your company?</b> –Describe why you need the loan and your intent with the funding.	

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**Business Economics** – Explain the pricing, business advantage, location, or any unique element associated with the business.

**Seasonal Factors** – Do you plan to have increasing volume month over month or will there be peaks and valleys based on the season? Explain...

**Products / Services** – Provide additional information about key products or services and how they are different from one another.

**Key Customers** – Describe customers that make up a significant portion of your revenue.

**Major Competitors** – Who are your competitors? What are their strengths and weaknesses?

**Describe company's competitive advantage** – How is your company different from your competitors and how is it better suited for the market?

**Future plans for growth / expansion** – Discuss the three to five year plan for the business: