A close up of a logo

Description automatically generated

BUSINESS PLAN TEMPLATE

**Cover Page**

**Executive Summary**

**Organization/Operation Plan**

1. Mission statement and business goals
2. Business Description summary
3. Date founded and by whom
4. Location and facility
5. Legal Structure / Form and ownership
6. Key officers and management team
7. Personnel
8. Production/services methods
9. Accounting and Recordkeeping
10. Billing and collection process
11. Insurance

**Marketing Plan**

1. Industry Trends
2. Target Market Description
3. Competitive Analysis
4. Distribution Channels
5. Pricing Strategy
6. Promotional Plan

**FINANCIAL PLAN and FINANCIAL DOCUMENTS**

* 1. Summary of financial needs and assumptions
  2. Source and Use of Funds
  3. Start-up expenses (include description and cost)
  4. 3-Year Cash Flow
  5. 3-Year Profit and Loss/Income Statement
  6. 3-Year Balance Sheet
  7. Revenue estimate

**V. Supporting Documents/Attachments**

Below is a list of possible attachments to support the business plan. These should be included only if they are applicable to the business.

1. Copies of personal financial statement and credit reports
2. Three years of personal and business (if applicable) tax returns
3. Copies of lease or rental agreements and other contracts or legal documents
4. Copies of business licenses and permits (if required)
5. Copies of insurance policies
6. Resumes
7. Organization chart and detailed job descriptions
8. Personal and business letters of reference
9. Samples of marketing materials (business cards, brochures, ads, flyers, price lists, etc)
10. Schematic of floor plan, signage, and picture of business location
11. Product endorsements
12. Proof of compliance with particular legal requirements for your type of business (for example, medical license for health care provider)
13. Articles of Incorporation, Partnership Agreement