

Business Profile

COMPANY INFORMATION

Company Name

Date Founded

Company Name

Legal Form of
Business

Sole Proprietorship
LLC

B Corp.
C Corp.

S Corp.

In three sentences or less, explain what your business does:

Major Products/ Services:

Three Biggest Customers:

List the names and percentages of company ownership:

Current Status and Statistics

Number of
Employees:

YTD Revenue:

Number of
Customers:

Last Year's
Revenue:

Project Growth:

Is the Company
Profitable?

Yes

Not

Yet

Our Best Customers Are...

(Describe who they are and WHY they are your best customers)

Our Biggest Competitors Are:

Our Biggest Competitors Are:

Our Brand Differentiator /Competitive Advantage:

Our Top 3 Strategies for Growing the Business:

History and Strategic Planning

Describe the biggest challenge you've overcome:

Describe the biggest challenge you are currently facing:

In five years, we will be...

Our plan to get there:

Personal

The work I most love about growing my business is:

The work I most loath about growing my business is:
