

# Sample Business Plan



## Summary Page

- ☐ Borrower name and the entity that will hold title to the facility
- ☐ Property legal description
- ☐ Purpose of the loan
- ☐ Loan amount and terms requested
- ☐ Loan Ratio, or Loan To Value (LTV) requested
- ☐ Collateral and source(s) of repayment
- ☐ Financial Summary

## Market Summary and Analysis

- ☐ Area map including facility, and Of the facility
- ☐ Demographics: population, growth, employment, & income
- ☐ Market Trends

## Neighborhood Analysis

- ☐ Location Description in relation to customer base
- ☐ Market position
- ☐ Competition

## Property Description

- ☐ Site plan and analysis
- ☐ Aerial and or Satellite Photo
- ☐ Property photos
- ☐ Improvement plans
- ☐ Management Summary
- ☐ Marketing Plan

## Financial Data

- ☐ 3-year historical financial performance (if possde)
- ☐ 3-year projection of operations
- ☐ Basis of these assumptions

**Make and Share Free Checklists**  
[checkli.com](https://checkli.com)