

**BRIEF DESCRIPTION OF BUSINESS SERVICES TO BE ATTAINED
AND WHO WILL PERFORM THESE SERVICES**

LOAN INFORMATION

| | | | |
|----------|--------------------|-----------|-----------|
| \$ _____ | # Jobs Maintained: | F/T _____ | P/T _____ |
| \$ _____ | Seasonal: | F/T _____ | P/T _____ |

SUMMARY OF SOURCES & USES

| Funds Required for Specific Services | Amount | Source of Funds (loans, personal investment/equity, friends or family, etc.) | Amount |
|--------------------------------------|----------|--|----------|
| Succession Plan | \$ _____ | CF Loan Requested | \$ _____ |
| For Sale by Owner Services | \$ _____ | Personal Investment | \$ _____ |
| Transition Plan | \$ _____ | | \$ _____ |
| Exit Options Planning | \$ _____ | | \$ _____ |
| Other (specify) | \$ _____ | | \$ _____ |
| Total | \$ _____ | Total | \$ _____ |

LOAN SECURITY

- **Promissory Note**
- **Letter of Offer**
- **Disclosure Statement**

Date

Applicant's Name

Applicant's Signature

Applicant's Name

Applicant's Signature

Witness Name

Witness Signature

Witness Name

Witness Signature