



THE NICKS GROUP

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*Offering a full array of tax services to meet your needs*

## Business Plan Summary

**The Nicks Group (TNG)** is here to help you facilitate the preparation and completion of your business plan. Below is a outline summary of information that will help you gather the necessary documentation for the completion of your business plan. If you have questions on the information required or the process to complete a business plan, please contact **The Nicks Group (TNG)** for assistance.

1. Briefly explain the nature of your business.
2. Date Business Began
3. Names of the founders and the functions they perform. (attach CVs or current resumes)
4. Number of employees and their functions. (attach CVs or current resumes)
5. Location of business, listing any branches or subsidiaries.
6. Description of the facilities
7. Description of products manufactured or services rendered
8. Banking relationships and information regarding current investors
9. Summary of company growth including financial or market highlights, e.g. your company doubled its worth in a 12-month period; you became the first company in your industry to provide a certain service.
10. Summary of management's future plans
11. Current Market Analysis that illustrates knowledge in your industry or business and the outlook and an evaluation of your competition, regulatory restrictions.
12. Company Description listing the marketplace's needs that you are trying to satisfy, along with specific individuals or organizations you have identified as having these needs.
13. Organizational Structure allowing the creation of an organizational chart
14. Ownership Information including the Names of Owners, Percentage of Ownership, Extent of Involvement with the Company, Forms of Ownership (e.g., common stock, preferred stock, general partner, limited partner), Outstanding Equity Equivalents (e.g., options, warrantes, convertible debt), and Common Stock (e.g., authorized or issued).
15. Marketing and Sales Strategies
16. Funding Request, including current funding requirement and requirements over the next five years.
17. Financials including Historical Financial Data and Prospective Financial Data.

### **Appendix**

A separate Appendix to your Business Plan should also be completed. This Appendix is not for everyone to view. Only specific individuals, such as your creditors, should have access to this information to make lending decisions. To complete the Appendix the following information will be required:

- Credit history (personal & business)
- Resumes of key managers
- Product pictures
- Letters of reference
- Details of market studies
- Relevavnt magazine articles or book references
- Licenses, permits, or patents
- Legal documents
- Building Permits
- Contracts
- List of business consultants, including attorney and accountant
- Copies of leases

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