

# CAPITAL CONSORTIUM: BUSINESS INFORMATION FORM

The Capital Consortium is a group of nonprofit lenders, for-profit lenders, and other funders, who work together along with Philadelphia's Department of Commerce to improve access to capital for small businesses throughout Philadelphia. Member organizations provide loans, grants, and technical assistance to small businesses in order to help them start and grow.

This form helps Capital Consortium members learn about your business and your capital needs. Complete the form below and email it to [loan.info@phila.gov](mailto:loan.info@phila.gov) or fax it to 215-683-2150 Attention: Capital Consortium. Your information will be shared with the Consortium members and if your project and capital needs match available resources, members of the consortium will contact you directly within ten (10) business days.

This form is not a loan or grant application and there is no guarantee of approval from any of the members. If one of the members is interested in working with you, they will contact you for more information.

## APPLICANT INFORMATION

Date: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Phone #: \_\_\_\_\_ Email Address: \_\_\_\_\_

What is the best way to reach you?  Phone  Email

Are you the  Business Owner  Property Owner  Both Business and Property Owner

Business Name: \_\_\_\_\_

Business Address: \_\_\_\_\_ ZIP Code: \_\_\_\_\_

Mailing Address (if different than above): \_\_\_\_\_ ZIP Code: \_\_\_\_\_

Legal Name of Property Owner: \_\_\_\_\_

Commercial Activities License # (if business owner): \_\_\_\_\_ EIN: \_\_\_\_\_

Type of Business: \_\_\_\_\_ Number of Employees: \_\_\_\_\_

What is your business structure?  Sole proprietorship  LLC  Corporation  Partnership  Other

**Describe your business. What products and services do you offer? How do you market and advertise? What makes you and your business unique? (If you have a business plan or executive summary, please attach it.)**

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Is there more than one owner of your business?  Yes  No

If yes, list their name/s and percentage of ownership: Owner 1: \_\_\_\_\_ %

Owner 2: \_\_\_\_\_ %

Owner 3: \_\_\_\_\_ %

## PROJECT INFORMATION AND CAPITAL NEEDS

How much funding do you seek? \$ \_\_\_\_\_

How much funding can you contribute? \$ \_\_\_\_\_

What is the total estimated project cost? \$ \_\_\_\_\_

(if the project is a fit-out/renovation or to purchase equipment)

What do you plan to use the funds for? (check all that apply)

Renovate or fit-out the interior

Purchase Inventory

Renovate the exterior

Marketing

Purchase Equipment

Other \_\_\_\_\_

Working Capital

Describe the improvement you plan to make, equipment you plan to purchase, or how the money will be used:

## FINANCIAL INFORMATION

Is your business a pre-revenue startup?  Yes  No

How many years has your business been open? \_\_\_\_ If incorporated, what is your date of incorporation? \_\_\_\_\_

Yearly Revenue (average over last three years):  \$0-\$50,000  \$50,001-\$100,000  \$100,001-\$200,000  >\$200,001

How much existing debt do you have? (Include personal and business debt)? \$ \_\_\_\_\_

How often do you do your bookkeeping?  Daily  Weekly  Monthly  Annually  Never

Do you have an accountant or bookkeeper?  Yes  No Do you use accounting software?  Yes  No

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Do you have a bank account for your business?  Yes  No

Do you have insurance for your business?  Yes  No

Do you have available collateral that you could pledge on a loan?  Yes  No  I don't know

If so, list the types and approximate value:

Do you have any serious credit issues, including accounts in collection?  Yes  No  I don't know

If you have an account in collection, are you on an approved installment plan?  Yes  No

Do you owe the IRS, Commonwealth of Pennsylvania, or City of Philadelphia any back taxes?  Yes  No

If you owe back taxes, are you on an approved repayment plan?  Yes  No

Do you file business tax returns? Individual tax returns?  Individual  Business  Both  Neither

Have you ever filed for bankruptcy (personal and/or business)?  Yes  No If Yes, is it still active?  Yes  No

Are you involved in any lawsuits?  Yes  No

## NEXT STEPS

For more information or to submit your notification of interest, please email [loan.info@phila.gov](mailto:loan.info@phila.gov) or call **Jonathan Snyder** at **215-683-2153**. Once a completed form is received, it will be forwarded to members of the Capital Consortium. If they are interested in working with you, they will contact you directly within ten (10) business days.