

MATCHED SAVINGS FUND BUSINESS PLAN CHECKLIST

This form should be attached to all business plans submitted for review.

	Date Reviewed
	Loan Officer
	Applicant
	Request Date

1. Business Profile
 - ↑ Business Description (includes: type of service, product, industry)
 - ↑ Type of Business
 - ↑ Legal Status
 - ↑ Identified Target Market
 - ↑ Business Goals
 - ↑ Proposed Use Of Funds

2. Marketing Plan
 - ↑ Advertising Methods
 - ↑ Other Publicity Methods
 - ↑ Timeline for Implementation

3. Financial Statements
 - ↑ Past Year Income Statements (if applicable)
 - ↑ Past Year Balance Sheet (if applicable)
 - ↑ Past Year Cash Flow Statements (if applicable)
 - ↑ Projected Income Statements
 - ↑ Current YTD Balance Sheet
 - ↑ Projected Balance Sheet (taking into account IDA funds disbursed)
 - ↑ Projected Cash Flow Statements

4. Additional Attachments
 - ↑ 3 vendor estimates for each purchased listed on the proposed use of funds
 - ↑ Proof of business bank account

5. TAP Review
 - ↑ Business Profile – reviewed & complete
 - ↑ Financial Statements – reviewed & complete
 - ↑ Additional Attachments - reviewed & complete

Additional Comments:
