

i.d.e.a.WF INVESTOR FACT SHEET

Business Name:			
Contact Name/Title:			Phone Number:
Type of business legal entity: (e.g. corporation, S-corp, LLC, proprietorship, partnership, etc.)			
Approximate amount (if any) of past equity investments: (<u>exclude</u> research grants and unpaid labor of founders)			
Management Team:	Name:		Ownership %:
Current Investors:	Name:		Ownership %:
Jobs to be Created:	Full Time:	Part Time:	Total Jobs Created:
Business Description: <i>Give a brief description of your business, the legal structure, and when it was formed.</i>			
Owners: <i>Briefly describe the owners' experience, qualifications, skill set, etc.</i>			
Problem: <i>Discuss the key pains in the industry and quantify them (time, \$\$\$, etc.).</i>			
Products/Services: <i>What is your solution? Describe your products and/or services.</i>			
Target Market/Marketing Strategy: <i>Your solution to the pain in the market should translate into a market opportunity. Describe your target market and any market segment(s) that exist within the market. Include the potential market size and growth rate. Describe the media through which you will reach the market.</i>			
Growth Opportunity: <i>How will your business create jobs and bring in revenue from outside of the immediate area?</i>			
Competition: <i>Briefly describe the competitive outlook and dynamics relevant to the market in which you will operate. Identify any current or potential direct and indirect competition. What is (are) your competitive advantage(s)? Do you have a strong know-how, an expansive network, high switching costs, long-term contracts, etc.? What barriers to entry prevent others from entering the market?</i>			
Business Model and Distribution Channels: <i>How does the business make money? How will you sell and price your product (description, license, recurring avenue, etc.). Which channel(s) will be used to reach your target market(s) (i.e. website, direct sales force, etc.)?</i>			

Historical Financial Performance

	2021	2022	2023
Sales	\$	\$	\$
Net Profit	\$	\$	\$
FTEs			

Projected Financial Performance

	2024	2025	2026
\$	\$	\$	\$
\$	\$	\$	\$

This form may be duplicated or expanded as necessary.