

## **Executive Summary Worksheet**

This worksheet will prompt you for the information that should be included in your executive summary. Pull the information asked for below from the other sections of your plan and keep each answer to three sentences or less.

**Business concept — the product, the market it will serve, and its competitive advantage.**

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**Financial features — information from financial statements and forms that document the viability of your business and its soundness as an investment**

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**Financial requirements — will you make equity available in return for an investment, what other sources of collateral does your business have.**

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**Current state of the business. Is your business an S corp, a C corp, a partnership or some other form of business. When was it formed.**

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**Owners, principals and key personnel**

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**Major achievements including patents, prototypes, contracts, market research indicating that the business is viable.**

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