

BUSINESS PLAN FOR INVESTORS TEMPLATE



The Business Plan for Investors is intended to be used as a template wherein the most relevant aspects which an investor must understand when making a decision in relation to the financing of a new company or business project are summarised. The Plan includes an executive summary which is enclosed to the different sections such as an analysis of the activity sector, competition and marketing and implementation strategies for the purposes of attaining the objectives set in the Plan. The last section estimates of sales volume, general expenses and return expectations, in order for the investor to have clear and sufficient information which will serve as an aid for the purposes of making a decision in relation to the financing of the new business project are furnished. The [Business Plan for Investors](#) is a preliminary step to the drawing up and signing of a Shareholders Agreement with the Investor.

BUSINESS PLAN FOR INVESTORS

.....
[name of the new business or startup]

1. EXECUTIVE SUMMARY

..... [enter legal name of the business], (hereinafter "Business") is intended to be formed as a [enter legal form], located in [enter complete address], poised for rapid growth in the industry of [enter type of industry] and specifically in the area of [enter city, state, country, where the new business will be launch]. The Business seeks funding to take advantage of a window of opportunity for introducing a new [product or service], which has the potential to successfully enter the market and get a representative share of it

Mission Statement

.....
.....
.....
[Describe the mission of the Business using complete sentences for proper formatting]

Entrepreneurs and Founders

The persons that led this new business are:

.....
.....
[Describe founders qualifications and experience related to this new project. Use complete sentences to describe their education, professional experience and any other aspects that sets them apart from others and demonstrates their capability to lead this new business].

The position of this persons in the Business are:

Mr/Mrs [enter full name] - [enter position]
Mr/Mrs [enter full name] - [enter position]
Mr/Mrs [enter full name] - [enter position]

[Some positions are: President, Chairman of the Board, CEO, Managing Director, Director, Vice President, Secretary of the Board, CFO, CCO, COP, etc.]

New Product. The Business has developed a [product or service] which has the following functions and competitive advantages:

Name of the product:

.....
.....
.....
.....

[Describe the product in a few sentences. This is your "elevator pitch"; what can you say about your company and product in 1-2 minutes while you're on an elevator with a prospective investor].

Funding Request. The total funding request is for a [enter amount and currency] business loan [or equity investment] for a period of years [enter number or years]. The funding proceeds will be used as follows:

..... [amount and currency] for Marketing. This amount is earmarked for effectively marketing the products as described below in the Marketing Summary section of the Business Plan.

.....[amount and currency] for Staffing. This portion of funding is intended for hiring employees to produce the products and assist marketing and sales efforts.

..... [amount and currency] for other uses. Also, the funds will be applied for the following uses:

.....
.....
.....

The Business is looking for long-term debt funding. Financial projections forecast a break-even point in less than [enter number] years after product introduction. Conservative estimates show at least a% [enter percentage] return on the investment by the end of the financing period.

.....

This is a sample of the Business Plan for Investors.
To get more information about this contract click here:

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USER GUIDE

WHAT TO INCLUDE IN A BUSINESS PLAN FOR INVESTORS

A Business Plan should be tailored towards the business itself. However, it is imperative to include as much detail as possible and present the information in an attractive light for investors. For example, if you need to keep certain information about your company confidential, you may opt for anyone who sees your business plan to sign a confidentiality statement. You should assess your business, your desires for your company, and your potential investors when deciding what to include in your business plan.

A Business Plan outlines a business's financial and operational goals. With a clear and concise plan in writing, it's easier to pitch your business ideas to potential partners and investors. A Business Plan also helps communicate the business's goals to its employees and leaders. You can customize this Business Plan to include details about the company, product, or service, and provide information on the market, forecasts, and financial analyses.

EXECUTIVE SUMMARY

The Executive Summary section of your Business Plan provides an introduction to the business and its products or services, its financial needs, and its special appeal for lenders or investors. If investors do not like your Executive Summary, they will not continue to read the rest of the business plan. Accordingly, the Executive Summary is designed to catch the attention of the busy lender or investor and create incentive. A potential investor should have a firm grasp on the business venture and a curiosity to know more after reading the Executive Summary.

MISSION STATEMENT

Not merely just a statement of intent, your Mission Statement for your company should convey the character of your company. The mission statement is an opportunity to detail your goals and objectives as well as reflect your business' special niche. A few items that you can include are general pricing, marketplace position, and growth potential. You can also comment on your relationships with customers and competitors, and perhaps any special technology that you use.

BUSINESS LEGAL ENTITY

When drafting a business plan, you will need to identify your business structure. It may be helpful to consult private legal and tax advisors before making a determination as to the type of business entity to form. Examples of the different principal entities include the following: Corporation, Limited Liability Company, Limited Partnership, General Partnership, Limited Liability Partnership, and Sole Proprietorship.

BUSINESS INDUSTRY

This section of the Business Plan provides an overview of the market or industry. It includes specific details about the size and value of the industry, if there are any seasonal factors to consider, and

characteristics unique to the new product or service that provide an edge for competing in the market.

MARKETING SUMMARY

This section defines the business' marketing strategy. It includes information about the intended market, the primary competition in that market, and the uniqueness of the business' product or service.

STRATEGY AND IMPLEMENTATION SUMMARY

This section details the plans for promoting the business through sales promotions and pricing strategies. Use this section to clearly outline all plans for promoting the business. Include the most basic ideas such as posting signs and flyers, and the more complex plans such as hosting promotional events or contests. This section should assure potential investors that every effort will be taken to make this business venture a success.

FINANCIAL PLAN

The Financial Plan section provides the capital needs, projections, and estimates for the business. It outlines the anticipated monthly running cost and expenses in addition to the anticipated revenue and profit in the first year. Be sure to consider all factors that affect the profitability and finances of the business venture. Employee salaries, production costs, maintenance fees, building rental expenses, insurance, utilities and marketing are a few major costs to consider when preparing the Financial Plan.

LOAN VS EQUITY INVESTMENT

With a business loan, the borrower repays the loan over time, and the lender has no say in how the business runs. In contrast, an equity investment is a lump sum of money given in exchange for "equity" in the company, which can be thought of as partial ownership of the company.

CONFIDENTIALITY

In any business plan for investors it is advisable to include a confidentiality clause for investors for which the investor agrees not to disclose, copy, reproduce, or distribute it without the express prior written permission of the company.

SIGNING AND DELIVERING

Once you've answered all of the questions and supplied the necessary information, you can make changes to the Business Plan in the document itself. You will be able to make changes online or in Word format in the Document Manager after you've answered all of the questions.

This document does not necessarily require a signature. Once completed, this document should be included in the Business Proposal to present to potential business partners or investors.

LEGAL WARNING

Depending upon your particular situation this document might not meet your needs and requirements. In case of doubt, you should consult a legal advisor.

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BUSINESS CONTRACTS & AGREEMENTS TEMPLATES

BUSINESS CONTRACTS

- Strategic Alliance Agreement
- Joint Venture Agreement
- Manufacturing Contract
- Supply Contract
- Service Provider Contract
- Consulting Services Contract

COMMERCIAL CONTRACTS

- Exclusive Distribution Contract
- Commercial Agency Contract
- Sales Representative Agreement
- Sales Commission Contract
- Real State Agent Agreement

LICENSE & FRANCHISE CONTRACTS

- Trademark License Agreement
- Technology Transfer Agreement
- Software License Agreement
- Franchise Contract
- Master Franchise Contract

CONFIDENTIALITY CONTRACTS

- Confidentiality Contract between Companies
- Confidentiality Contract for Product or Business Idea
- Confidentiality Contract for Employees
- Confidentiality Contract for Consultants and Contractors

SHAREHOLDERS & INVESTORS AGREEMENTS

- Shareholders Agreement for a New Company
- Investors Agreement
- Business Plan for Investors
- Business Proposal for Investors

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