



Prospect Snapshot

Business Name: _____ **Year Started:** _____

Management Contact Name & Title: _____

Phone: _____ **Email:** _____

Business Description: _____

Current Monthly Sales: \$ _____ **Annual Sales Projection:** \$ _____

Total A/R Outstanding: \$ _____ **Total A/R + 90 days:** \$ _____

Top Five Customers:

_____	Current A/R Outstanding: \$ _____
_____	Current A/R Outstanding: \$ _____
_____	Current A/R Outstanding: \$ _____
_____	Current A/R Outstanding: \$ _____
_____	Current A/R Outstanding: \$ _____

Current Financing:

Line of Credit balance: \$ _____ **Term Loan balance:** \$ _____

Lending Source: _____

Collateral Pledged: _____

Total A/P Balance: \$ _____ **A/P +90 day** \$ _____

Desired Use of Funds:

Referred By: _____

Relationship to Business: _____