

Business Name

Date

Owner's Name(s)

Address

Phone Number



Business Expansion & Diversification  
Assistance Services Application

May 2010

## ***Community Futures Northwest Alberta Business Assistance Services Application***

### **Business Stabilization, Diversification and Growth Initiative for Northwest Alberta**

CFNWA concentrates on small business financing as a non-traditional lender for viable new and existing businesses. We also assist some of the regions Not for Profit organizations to help build business capacity with in their administrative and business functions.

This project will:

- Concentrate on existing regionally based businesses (primarily those impacted by Forestry) to identify and implement tailored growth solutions and strategies.
- Identified, eligible businesses are visited, interviewed and assessed for business growth potential and skill development needs.
- Prepare a tailored, business growth strategy, develop and analyze identified skill development needs and prepare an action strategy. Submit to client.
- Implement strategy acting as a resource, with and for client.
- Periodically reassess strategy and amend actions as appropriate.
- Confidential client report prepared and presented to Business Client with evaluation.

The intent is to assist, stabilize and grow or diversify individual small and medium businesses as well as corresponding employee skills, while developing a Toolkit for SME's in Northwestern Alberta.

Community Futures Northwest Alberta will facilitate SME business growth in all major communities in its area of jurisdiction, and will focus its growth and diversification efforts on the following communities:

Communities	
La Crete	High Level
Fort Vermilion	Rainbow Lake
Little Red River First Nation	Tall Cree First Nation
Beaver First Nation	Dene Tha First Nation
Paddle Prairie First Nation	Zama

- The Community Futures Northwest Alberta office may provide business advisory and technical services to small businesses and potential entrepreneurs in the CF region. These services can include (but are not limited to):
  - Access to business loans.
    - Commercial loans normally up to \$150,000
    - Disabled entrepreneur loans up to \$150,000
    - Youth loans up to \$25,000

- Business Services including:
  - Assisting with Business Planning and analysis
  - Review of Cash flow and Financial Projections.
  - Facilitate Marketing plans and market research.
  - General business counseling.
  - Access to community profile and industry information and statistics.
  - Licensing and regulatory information
  - Referral information
- Entrepreneurial training programs.
- Business venture assessment and marketing analysis.

Business Information					
List the name(s) and percentage of shares of all principle owner(s) of the business:					
<b>First Name:</b>	<b>Last Name:</b>	<b>Percentage of Shares</b>	<b>Telephone:</b>		
Type of Business: (check all that apply)	Home Based <input type="checkbox"/>	Start up <input type="checkbox"/>	Existing <input type="checkbox"/>	Full Time <input type="checkbox"/>	Part Time <input type="checkbox"/>
	Proprietorship <input type="checkbox"/>	Incorporation <input type="checkbox"/>	Partnership <input type="checkbox"/>	Non-Profit <input type="checkbox"/>	Co-op <input type="checkbox"/>
	Retail <input type="checkbox"/>	Service <input type="checkbox"/>	Oil & Gas <input type="checkbox"/>	Manufacturing <input type="checkbox"/>	
	Forestry <input type="checkbox"/>	Agriculture <input type="checkbox"/>	Tourism <input type="checkbox"/>	Construction <input type="checkbox"/>	
Business has been operating since: (if applicable)					
Business fiscal year end is/will be:					

## Business Contact Information

Business Name: <i>(Legal Name)</i>			
Business Number:	WCB #	Incorporation #	
Physical Address:		Town:	Postal Code:
Telephone:	Fax:	Email:	Website:
Mailing Address: <i>(If different from above)</i>			
This Business will create/maintain _____ Full Time Employees _____ Part Time Employees			

## Current Business Information Requested:

<ul style="list-style-type: none"> <li>• Financials for past 2 years</li> <li>• YTD Financials</li> <li>• Status of business</li> <li>• Cash flow projection</li> </ul>
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## Personal Information of Applicant(s)

*(Complete this section for each applicant as applicable)*

Last Name:	Middle Name:	First Name:	
Home Address:			
Town/Region		Postal Code:	
Home Phone:	Business Phone:	Cell:	
Email:			
Birth Date: MM    DD    YY			
<b>Are You:</b> <i>(check all that apply):</i>	A Canadian Citizen <input type="checkbox"/>	Immigrant/Permanent Resident <input type="checkbox"/>	Aboriginal <input type="checkbox"/>
	On a Disability subsidy <input type="checkbox"/>	On Employment Insurance <input type="checkbox"/>	Disabled <input type="checkbox"/>

<b>Do you have:</b>			<b>Name:</b>	<b>Phone and Address:</b>
A Lawyer?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	_____	_____
An Accountant?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	_____	_____
<b>You were referred to Community Futures by: (check all that apply)</b>				
Another lender <input type="checkbox"/>		An accountant or lawyer <input type="checkbox"/>		Word of Mouth <input type="checkbox"/>
Advertising <input type="checkbox"/>		Other _____ <input type="checkbox"/>		

<p><b>Business History</b> <i>(Examples: Sales growth/decline, stable costs or fluctuating costs)</i></p>

### **Growth Expansion Concept**

**Within the next 5 years do you plan to:**

- **Add or discontinue new products or services**
- **Redesign product line and market to the same client?**

**How would you like to grow your business:**

- **Increase product/services?**
- **Hire new staff?**
- **Increase sales?**
- **Develop new customers for new product/services?**
- **Develop new customers for existing product/services?**
- **Change current business location?**
- **Any other ideas?**

**Is there anything holding your business back from growing today? Will there be anything in the next 5 years?**

**What are Your Business's Specific Needs?**

*(Examples: Employee Skills, Management, Cash flow.)*

## Declarations

*(Complete this section for each applicant and spouse)*

Have any of the applicant(s) ever had an asset repossessed?

Yes

No

Have any of the applicant(s) ever declared for bankruptcy?  
(If Yes please list date discharged)

Yes

No

Are any of the applicant(s) party to any claims or lawsuits?

Yes

No

Are you or any closely related individual or company involved in ANY legal action or litigation either personally or through your business?

Yes

No

The statements made herein are for the express purpose of applying for business counseling assistance from Community Futures Northwest Alberta and are to the best of my/our knowledge and belief are true and correct.

The applicant understands that additional information, if required in support of this application, must be supplied to the Community Futures before consideration can be given to this application.

### **Application must be signed before it can be processed.**

The foregoing information is submitted for the purpose of establishing or maintaining assistance with Community Futures and is a true, full and correct statement of my/our financial condition on the date shown.

The information contained in this application will remain confidential to CFNWA, its staff, consultants and officers and will not be used for any other purpose without the approval of the applicant(s).

I, the undersigned, declare that the statements made herein are for the purpose of obtaining business assistance and are to the best of my knowledge complete and correct.

\_\_\_\_\_  
Applicant's Signature

\_\_\_\_\_  
Applicant's Name (Print)

\_\_\_\_\_  
Date