

Application for Existing Business Expansion

Application Instructions

This application consists of 9 sections, please answer all the questions in the application and provide any of the available information / documents itemized in the appendices list.

- a- Information about the Owners
 - 1- Filling the full name according to the official documents.
 - 2- Providing separate information tables for each owner in the case of more than one owner.
 - 3- If the owner is a company or organization, filling the relevant information such as the name and the address.

- b- Information about the Business
 - 1- Filling the information in this section according to the business legal documents.

- c- Products / Customers / Competition
 - 1- Products / Services
 - i. What are the products and / or services?
 - ii. List and briefly describe the products and / or services.
 - iii. What is the role of the business for each of those products and / or services (manufacturer, wholesaler, retailer, distributor, exclusive dealer, dealer)?
 - i. Distinguish between existing products and / or services and new products and / or services.
 - ii. What are the products and services will developed in the future? And Why?

 - 2- Customers / Target Market
 - i. Who are the customers? What is the target market?
 - ii. Describe the demographic and geographic profile of the target customer (age, group, gender, income level, special needs, location and others).
 - iii. Distinguish between current and expected markets
 - iv. Distributing the business's current sales on the different markets (as ratios).
 - 3- Competition
 - i. List the main competitors and the main competing products and / or services.

- ii. List any competing close substitute products and / or services
- iii. Specify current market shares.
- iv. Expected market shares.

d- Marketing

1- Competitive advantage

- i. Why do customers buy from you?
- ii. How do you differentiate yourself from your competitors and competing products and / or services?
- iii. What is your unique selling proposition?
- iv. Competitive advantages include: price, quality, location, convenience, service and others.
- v. What are the expected additional competitive advantage / s after expansion?

2- Pricing

- i. What are the selling prices of products / services that you offer?
- ii. How do you set the prices (according to the market price, cost plus a profit margin, others)?
- iii. How do the products / services prices you offer compare to the market?
- iv. Distinguish between the prices of existing products and / or services and the prices of new products and / or services.

3- Distribution

- i. Where are the customers?
- ii. How do they get the product and / or service?
- iii. Describe the method of distribution. Distinguish between:
 - Single point of sale.
 - Retailing through multiple point of sales.
 - Wholesaling through company gents.
 - Wholesaling through third party agents or distributors.
- iv. Distinguish between current and future distribution methods.

4- Marketing and Promotion

- i. How do customers know about the business and its products / services?
- ii. Distinguish between current and future marketing and promotion activities.

e- Inputs / Production / Management

1- Inputs and suppliers

- i. What are the main raw materials, inventory, and equipment needed and who are the suppliers?
 - ii. Specify the main raw materials, inventory, and equipment.
 - iii. Specify the main suppliers by name and location.
 - iv. Describe how many potential suppliers there are.
 - v. Describe any special terms offered by suppliers.
 - vi. Distinguish between current and future inputs.
 - vii. Distinguish between current and future suppliers.
- 2- Production / Operation
- i. How does your business produce its final products and / or services to the customer?
 - ii. Distinguish between current and future production / operation cycles.
 - iii. What is industry standards? And how the business will accomplish.
 - iv. What is the level of technology used in production? To what extent this technology is advanced in comparison to the industry state of art.
- 3- Management and Employees
- i. List the current management team.
 - ii. Describe current management team in terms of experience and education.
 - iii. List the current management, administrative, and operational jobs distributed according to the job title.
 - iv. List of new management, administrative, and operational jobs distributed according to the job title.
- f- Historical Financial Information
- 1- Specify the source of the historical financial information.
 - 2- Specify the currency used in preparing the historical financial information.
 - 3- In filling this part, request help from accountant, financial manager, auditor or any other party who is responsible for preparing, reporting, or auditing the business' financial information.
- g- Historical Fixed Assets
- 1- Specify the source of the historical financial information related to fixed assets.
 - 2- Specify the currency used in preparing the historical financial information related to fixed assets.

- 3- Filling this table according to the business' financial records and the available supporting documents.
- h- Project Costs and Financing
- 1- Specify the currency used in preparing the project costs and financing.
 - 2- Detailed list of all items related to the expansion which includes lands, buildings, machinery and equipment, and working capital.
 - 3- Determine the total cost for each item and then determine the portions that will be financed by the current owner, potential investor, and loan.
 - 4- The total cost of the item should equal the total of three financing sources.
- i- Financial Projections
- 1- Specify the currency used in preparing the financial projections.
 - 2- Preparing preliminary financial projections in the form of cash flows.
 - 3- Identifying and naming the sources of cash inflows according the type and nature of the business.
 - 4- Using the spaces to add cash outflow items as needed.
- j- Appendices: Attach the following appendices if available:
- 1- Copy of the applicant's identity card.
 - 2- Copy of the business's registration certificate.
 - 3- Copies of licenses and permissions.
 - 4- Business's historical financial statements.
 - 5- Business plan / feasibility study.
 - 6- Market research.
 - 7- Studies and engineering plans.
 - 8- Price quotation for machinery and equipment.
 - 9- Agreements with suppliers / customers.
 - 10- Exclusive agency / agency agreements.
 - 11- Other documents.

Information about the Application	
Applicant Name	
Submission Date	
a- Information about the Owners	
First Owner:	
Full Name	
Gender	
Street Address	
City / Village	
Telephone / Mobile	
E-mail	
Age	
Employment	
Education	
Languages	
Second Owner:	
Full Name	
Gender	

Street Address	
City / Village	
Telephone / Mobile	
E-mail	
Age	
Employment	
Education	
Languages	
Third Owner:	
Full Name	
Gender	
Street Address	
City / Village	
Telephone / Mobile	
E-mail	
Age	

Employment	
Education	
Languages	
Fourth Owner:	
Full Name	
Gender	
Street Address	
City / Village	
Telephone / Mobile	
E-mail	
Age	
Employment	
Education	
Languages	
b- Information about the Business	
Legal Name	
Street Address	
City / Village	

Telephone / Fax	
E-mail	
Website	
Establishment Date	
Legal Registration Number	
License and Permissions	
Number of Employees	
Owners and Owners' Percentages	
c- Products / Customers / Competition	
1- Products / Services	
2- Customers / Target market	
3- Competition	

d- Marketing	
1- Competitive Advantage	
2- Pricing	
3- Distribution	
4- Marketing and Promotion	
e- Inputs / Production / Management	
1- Inputs and Suppliers	

2- Production / Operation/Technology	
3- Management and Employees	
Chart of Organization Structure	
f- Historical Financial Information	
Source of historical financial information	Management, compiled financial statements, audited financial statements
Currency used in preparing historical financial information	Shekel, Dollar, Dinar, Others

	2008	2009	2010	2011	2012
Sales					
Gross Profit					
Operating profit					
Net Income					
Operating Cash Flow					
Net Cash Flow					
Total Assets					
Total Fixed Assets					
Liabilities					
Owners Equity					

g- Historical Fixed Assets					
Currency used in preparing historical financial information					Shekel, Dollar, Dinar, Others
	Book Value	Annual Depreciation	Cost	Purchasing Year	Notes
1-					
2-					
3-					
4-					
5-					
6-					
7-					
8-					
9-					
10-					
h- Project Costs and Financing					
Currency used in preparing project costs and financing					Shekel, Dollar, Dinar, Others
	Total Cost	Self Financing	External Investor	Loan	Notes
-1					
-2					
-3					
-4					
-5					
-6					
-7					
-8					
-9					
-10					
-11					

-12					
-13					
-14					
-15					
-16					
-17					
-18					
-19					
i- Financial Projections					
Currency used in preparing financial projections				Shekel, Dollar, Dinar, Others	
	2013	2014	2015	2016	2017
Cash Inflows:					
1-					
2-					
3-					
4-					
5-					
Total					
Cash Outflow:					
Buildings					

Maintenance					
Equipment					
Raw materials / Inventory					
Salaries					
Rent					
Electricity and Water					
Distribution					
Marketing					

