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**TORY BURCH FOUNDATION**

**BUSINESS PLAN BUILDER**

Welcome to the Business Plan Builder. This is a comprehensive template that you can tailor to your company’s needs.

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**Instructions**

**This is a read-only template document. In order to make this document your own, make a copy to your computer. The Tory Burch Foundation will not have access to your business plan; you will be the sole owner.**

* Open the Microsoft Word template you want to use.
* Go to File, then Save as. Your editable copy will download automatically. Open your saved file and start editing.
* Be sure to save your progress as you go.

**Use the writing prompts and relevant content linked in the sections to help you write your
business plan.**

**Customized Examples**

**View examples of this template customized in Google Docs**

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| A picture containing graphical user interface  Description automatically generated[View example](https://docs.google.com/document/d/1h8oblwlhHHce9lfvmHOffhu8vJqqlVCdoEWSu_rcNaA/edit?usp=sharing) | Text  Description automatically generated[View example](https://docs.google.com/document/d/1wGAnzV6HEldRdeuHXm8knI2f1CffzkfGPflG_-laZrc/edit?usp=sharing) |

**Tips & Tricks**

* **How to paste text and match established formatting**
	+ Select the text you want to replace.
	+ Click the drop down Edit, then Paste and Match Formatting.
* **How to edit heading and paragraph font styles. Make the desired type style edits to font choice, size, color to selected text. This will change each instance of these styles throughout the document.**
	+ Click Home and then click Styles Pane to view all global type styles.
	+ Click the caret next to the style you would like to update, then Modify Style to edit the type style globally.
* **How to insert a section break**
	+ Go to the end of the text you want to insert the break.
	+ Click Insert, then Page Break.
* **How to delete a section break**
	+ Select Home, then Show/Hide  to show section breaks.
	+ If on a Mac computer, place your cursor in front of the section break. Then, press fn + Delete.
	+ If on a Windows computer, place your cursor on the line directly above the section break. Then, press Delete.
* **How to insert images**
	+ Right-click an image container and select Change Picture.
* **How to resize the bounding box/crop of an image**
	+ Double-click on the image element and update the outlined toggles.
* **How to add more team members**
	+ The team members section is a table.
	+ View the boundaries of the table by clicking **** in the top left corner. With the table highlighted right-click and select Table Properties.
	+ Add a border to the table to see the boundaries of the table.
	+ Right-click in this section and select Insert, then Rows Below.
* **How to remove team members**
	+ The team members section is a table.
	+ View the boundaries of the table by clicking **** in the top left corner. With the table highlighted right-click and select Table Properties.
	+ Add a border to the table to see the boundaries of the table
* **How to edit a table**
	+ View the boundaries of the table by clicking **** in the top left corner. With the table highlighted, right-click and select Table Properties.
	+ Add a border to the table to see the boundaries of the table.
	+ To edit the inside color of a table, select and highlight the table then click the shading tool **** and select a new color.
	+ If you would like to shrink the size of the box, you can hover your mouse towards the border of the box until your mouse changes to a resizing toggle. When you see your mouse change, click and drag to shrink.
* **How to change the color of the cover page**
	+ Select the background shape and use the Format Shape panel to update the color.
* **How to update the footer business name**
	+ Double click the footer area or click the View drop down and select Header and Footer to make the area editable. You can now update the footer to reflect across all pages.
* **How to update the header color strip**
	+ Double-click the header area or click the View drop down and select Header and Footer to make the area editable.
	+ Use the Format Shape panel to update the strip color.

*Delete these pages once done editing*

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| **Business Name***Delete these instructions when done editing this page.*123 address, Virginia beach Va, 23464123.456.7890email@gmail.comWebsiteurl.com*To add your social media links to the relevant icons, right-click the icon and select Hyperlink. Delete unneeded icons.Update background by double clicking to edit the color or inserting an image* |

## TABLE OF CONTENTS

*Be sure to insert the correct page numbers when you are finished updating then, right-click on the updated page numbers, select 'Link' and find the corresponding heading in the 'Headings and bookmarks' at the bottom of the suggestion box.*

Executive Summary [PG3](#_heading=h.26in1rg)

Our Company Description [PG5](#_heading=h.lnxbz9)

Who We Are [PG7](#_heading=h.44sinio)

Market Opportunity [PG9](#_heading=h.pkwqa1)

Beyond the Bottom Line [PG3](#_heading=h.26in1rg)

Our Products and Services [PG3](#_heading=h.26in1rg)

Marketing and Sales [PG3](#_heading=h.26in1rg)

Operations [PG3](#_heading=h.26in1rg)

Financials [PG3](#_heading=h.26in1rg)

* Startup Costs
* Income Statement
* Cash Flow Statement
* Balance Sheet
* Financial Projections

Back Cover [PG3](#_heading=h.26in1rg)

## EXECUTIVE SUMMARY

Writing prompt below. Be sure to replace all text on this page.
*The executive summary is your elevator pitch. Here you should speak directly to the reader and describe your business, product or service, what sets your business apart from your competition.*

*Consider the ways your business solves a problem, has a competitive advantage or a unique approach in the market.*

*Here you should also clearly state the vision for your business and the goals that will help you get there. And last but not least, state who your target customer group is.*

*Things to remember:*

* *Think about who your reader is and how you can engage them. What do they need to know about your company?*
* *Illustrate your passion for the business*
* *Avoid fluff or hyperbole*
* *Clearly state the need, your value proposition and target customer. You can also include a specific ask to investors.*

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## OUR COMPANY DESCRIPTION

Mission Statement
Writing prompt below. Be sure to replace all text on this page. *The mission statement is an expression of your company’s guiding philosophy, a high-level objective or a set of values that led you into business.*

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### Company History

Writing prompt below. Be sure to replace all text in this section.*Provide details on when your company was founded, who founded it and a brief summary of your company’s progress. If the business is new, explain why you decided to start the company*.

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### Location and Facilities

Writing prompt below. Be sure to replace all text in this section. *Outline the offices and locations involved in the operation of your company.*

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## WHO WE ARE

### Legal Structure

Writing prompt below. Be sure to replace all text in this section.
*Indicate your business’ legal structure:* [*Sole proprietorship*](http://www.toryburchfoundation.org/resources/starting-a-business/choose-your-business-structure-sole-proprietorship/)*,* [*limited liability corporation*](http://www.toryburchfoundation.org/resources/starting-a-business/choose-your-business-structure-limited-liability-company/)*,* [*cooperative*](http://www.toryburchfoundation.org/resources/starting-a-business/choose-your-business-structure-cooperative-2/)*,* [*partnership*](http://www.toryburchfoundation.org/resources/starting-a-business/choose-your-business-structure-partnership/) *or* [*S Corporation*](http://www.toryburchfoundation.org/resources/starting-a-business/choose-your-business-structure-cooperative/)*.*

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### Ownership Structure and Management

Writing prompt below. Be sure to replace all text in this section.
*Explain your business’ organization structure or organization chart. Indicate who the owners are, what percentage of the business they own, type of ownership (stock options or general partner) the extent of their involvement (silent or acting partner). If you are sole proprietor, remove this section.*

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### Founding team

Writing prompt below. Be sure to replace all text on this page.
*Name the founding team and share a few notes about their qualifications and career history***.**

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**Board and Advisory Committee**

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## MARKET OPPORTUNITY

Writing prompt below. Be sure to replace all text on this page.
Summarize why customers need your product and how your model stands out from other companies. Read [this article](http://www.toryburchfoundation.org/resources/starting-a-business/create-your-business-plan-market-analysis/) *for more advice on completing the Market Opportunity section of your business plan.*

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| Industry Analysis | Writing prompt below. Be sure to replace all text in this section.*Provide details about the characteristics of your industry such as the size, growth potential and current market trends.* Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec elementum enim et urna egestas mattis. Donec libero ex, volutpat sit amet ipsum sed, rutrum mollis turpis. Donec iaculis nunc lorem, sit amet mattis felis finibus eu. Pellentesque ante erat, scelerisque eget velit id, efficitur aliquam nibh.  |

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| Market Description | Writing prompt below. Be sure to replace all text in this section.*Describe the market your company is targeting and how your company fits into or disrupts it. Outline the particular market segments you will be targeting.*Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec elementum enim et urna egestas mattis. Donec libero ex, volutpat sit amet ipsum sed, rutrum mollis turpis. Donec iaculis nunc lorem, sit amet mattis felis finibus eu. Pellentesque ante erat, scelerisque eget velit id, efficitur aliquam nibh. |

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| Target Customers | Writing prompt below. Be sure to replace all text in this section.*Give a profile of your target customer, customer groups and connect their needs to your product or service’s value proposition.*Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec elementum enim et urna egestas mattis. Donec libero ex, volutpat sit amet ipsum sed, rutrum mollis turpis. Donec iaculis nunc lorem, sit amet mattis felis finibus eu. Pellentesque ante erat, scelerisque eget velit id, efficitur aliquam nibh.  |

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| Current Customers  | Writing prompt below. Be sure to replace all text in this section.*Include demographic information like age range, gender, income; industry (for B2B companies), behavioral patterns. Also, consider where you are acquiring these current customers.*Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec elementum enim et urna egestas mattis. Donec libero ex, volutpat sit amet ipsum sed, rutrum mollis turpis. Donec iaculis nunc lorem, sit amet mattis felis finibus eu. Pellentesque ante erat, scelerisque eget velit id, efficitur aliquam nibh.  |

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| Competitors | Writing prompt below. Be sure to replace all text in this section.*List who your current competitors are or who you expect they will be.*Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec elementum enim et urna egestas mattis. Donec libero ex, volutpat sit amet ipsum sed, rutrum mollis turpis. |

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| Competitive Advantages | Writing prompt below. Be sure to replace all text in this section.*These are the attributes that set your business apart from your competitors. What do you do better that allows you to stand out? Advantages may include quality, price, or service.* Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec elementum enim et urna egestas mattis. Donec libero ex, volutpat sit amet ipsum sed, rutrum mollis turpis. Donec iaculis nunc lorem, sit amet mattis felis finibus eu. Pellentesque ante erat, scelerisque eget velit id, efficitur aliquam nibh. |

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| Regulations  | Writing prompt below. Be sure to replace all text in this section.*Cite any custom or regulatory requirements that affect your business. Indicate how you comply with the regulations. It is also helpful to cite any cost implications these regulations may have for your business.* Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec elementum enim et urna egestas mattis. Donec libero ex, volutpat sit amet ipsum sed, rutrum mollis turpis. Donec iaculis nunc lorem, sit amet mattis felis finibus eu. Pellentesque ante erat, scelerisque eget velit id, efficitur aliquam nibh. |

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## BEYOND THE BOTTOM LINE

### Social Impact

Writing prompt below. Be sure to replace all text in this section. *If your business has a social impact component, indicate the problem your business is setting out to address. Consider adding background information about the need or problem that would help someone understand the value-add your business provides.*

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### Sustainability

Writing prompt below. Be sure to replace all text in this section. *If sustainability is part of your business model, indicate the ways your business is addressing environmental impact.*

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## OUR PRODUCTS & SERVICES

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| Products/Services Benefits  | Writing prompt below. Be sure to replace all text in this section.*Include information about the specific benefits of your product or service, from your customers’ perspective. You should also write about your product or service’s ability to meet consumer needs, any advantages your product has over that of the competition, and the current development stage of your product (e.g., idea, prototype).*Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec elementum enim et urna egestas mattis. Donec libero ex, volutpat sit amet ipsum sed, rutrum mollis turpis. Donec iaculis nunc lorem, sit amet mattis felis finibus eu. |

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| Pricing Structure  | Writing prompt below. Be sure to replace all text in this section.*Outline what your company charges for each of your products and services. What will your markups be and why?*Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec elementum enim et urna egestas mattis. Donec libero ex, volutpat sit amet ipsum sed, rutrum mollis turpis. Donec iaculis nunc lorem, sit amet mattis felis finibus eu.Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec elementum enim et urna egestas mattis. Donec libero ex, volutpat sit amet ipsum sed, rutrum mollis turpis. Donec iaculis nunc lorem, sit amet mattis felis finibus eu. |

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| Lifecycle  | Writing prompt below. Be sure to replace all text in this section.*Be sure to include information about where your product or service is in its life cycle, as well as any factors that may influence its cycle in the future.*Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec elementum enim et urna egestas mattis. Donec libero ex, volutpat sit amet ipsum sed, rutrum mollis turpis. Donec iaculis nunc lorem, sit amet mattis felis finibus eu. |

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| Intellectual Property Rights | Writing prompt below. Be sure to replace all text in this section.*If you have any existing, pending, or any anticipated copyright or patent filings, list them here. Also disclose whether any key aspects of a product may be classified as trade secrets. Lastly, include any information pertaining to existing legal agreements, such as nondisclosure or non-compete agreements.*Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec elementum enim et urna egestas mattis. Donec libero ex, volutpat sit amet ipsum sed, rutrum mollis turpis. Donec iaculis nunc lorem, sit amet mattis felis finibus eu. Pellentesque ante erat, scelerisque eget velit id, efficitur aliquam nibh. Aenean in consequat leo. Ut sem nibh, rhoncus facilisis condimentum a, ornare ac nisi.  |

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| Research and Development Activities  | Writing prompt below. Be sure to replace all text in this section.*Outline any R&D activities that you are involved in or are planning. What results of future R&D activities do you expect? Be sure to analyze the R&D efforts of not only your own business, but also of others in your industry.*Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec elementum enim et urna egestas mattis. Donec libero ex, volutpat sit amet ipsum sed, rutrum mollis turpis. Donec iaculis nunc lorem, sit amet mattis felis finibus eu. Pellentesque ante erat, scelerisque eget velit id, efficitur aliquam nibh. Aenean in consequat leo. Ut sem nibh, rhoncus facilisis condimentum a, ornare ac nisi. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec elementum enim et urna egestas mattis. Donec libero ex, volutpat sit amet ipsum sed, rutrum mollis turpis. Donec iaculis nunc lorem, sit amet mattis felis finibus eu. Pellentesque ante erat, scelerisque eget velit id, efficitur aliquam nibh. Aenean in consequat leo. Ut sem nibh, rhoncus facilisis condimentum a, ornare ac nisi.  |

## MARKETING & SALES

Writing prompt below. Be sure to replace all text on this page.
*For more advice on how to complete this section,* [*read this article*](http://www.toryburchfoundation.org/resources/starting-a-business/create-your-business-plan-market-analysis/) *on starting a business plan.*

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| Value Proposition | Writing prompt below. Be sure to replace all text in this section.*Define the benefits your company's products and services offer to the customer, and why customers should choose yours over a competitor.*Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec elementum enim et urna egestas mattis. Donec libero ex, volutpat sit amet ipsum sed, rutrum mollis turpis. Donec iaculis nunc lorem, sit amet mattis felis finibus eu. Pellentesque ante erat, scelerisque eget velit id, efficitur aliquam nibh. Aenean in consequat leo. Ut sem nibh, rhoncus facilisis condimentum a, ornare ac nisi.  |

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| Communication Strategy | Writing prompt below. Be sure to replace all text in this section.*Outline how you’ll reach your customers.*Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec elementum enim et urna egestas mattis. Donec libero ex, volutpat sit amet ipsum sed, rutrum mollis turpis. Donec iaculis nunc lorem, sit amet mattis felis finibus eu. Pellentesque ante erat, scelerisque eget velit id, efficitur aliquam nibh. Aenean in consequat leo. Ut sem nibh, rhoncus facilisis condimentum a, ornare ac nisi. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec elementum enim et urna egestas mattis. Donec libero ex, volutpat sit amet ipsum sed, rutrum mollis turpis. Donec iaculis nunc lorem, sit amet mattis felis finibus eu. Pellentesque ante erat, scelerisque eget velit id, efficitur aliquam nibh. Aenean in consequat leo. Ut sem nibh, rhoncus facilisis condimentum a, ornare ac nisi.  |

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| Sales Team | Writing prompt below. Be sure to replace all text in this section.*Indicate the number and category (internal vs. external) of your salesforce. Include training and compensation information.*Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec elementum enim et urna egestas mattis. Donec libero ex, volutpat sit amet ipsum sed, rutrum mollis turpis. Donec iaculis nunc lorem, sit amet mattis felis finibus eu. Pellentesque ante erat, scelerisque eget velit id, efficitur aliquam nibh. Aenean in consequat leo. Ut sem nibh, rhoncus facilisis condimentum a, ornare ac nisi. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec elementum enim et urna egestas mattis. Donec libero ex, volutpat sit amet ipsum sed, rutrum mollis turpis. Donec iaculis nunc lorem, sit amet mattis felis finibus eu. Pellentesque ante erat, scelerisque eget velit id, efficitur aliquam nibh. Aenean in consequat leo. Ut sem nibh, rhoncus facilisis condimentum a, ornare ac nisi.  |

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| Sales Activity | Writing prompt below. Be sure to replace all text in this section. *Define your* [*sales strategy*](https://www.google.com/url?q=http://www.toryburchfoundation.org/resources/marketing/sales-strategy/&sa=D&source=docs&ust=1634224520645000&usg=AOvVaw0KP7xk4kgHEm0-fTBdO3Xy)*.*Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec elementum enim et urna egestas mattis. Donec libero ex, volutpat sit amet ipsum sed, rutrum mollis turpis. Donec iaculis nunc lorem, sit amet mattis felis finibus eu. Pellentesque ante erat, scelerisque eget velit id, efficitur aliquam nibh. Aenean in consequat leo. Ut sem nibh, rhoncus facilisis condimentum a, ornare ac nisi.  |

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| Growth Strategy | Writing prompt below. Be sure to replace all text in this section.*Share how you intend to grow your business: whether with an internal strategy, franchise opportunities or other methods.*Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec elementum enim et urna egestas mattis. Donec libero ex, volutpat sit amet ipsum sed, rutrum mollis turpis. Donec iaculis nunc lorem, sit amet mattis felis finibus eu. Pellentesque ante erat, scelerisque eget velit id, efficitur aliquam nibh. Aenean in consequat leo. Ut sem nibh, rhoncus facilisis condimentum a, ornare ac nisi.  |

## OPERATIONS

### Production

Writing prompt below. Be sure to replace all text in this section.
*Explain how your product or service gets made or is performed. Include information about inventory, sampling processes, quality control measures or certifications, etc. if applicable.*

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### Location

Writing prompt below. Be sure to replace all text in this section.
*Describe your storefront, office or production facility*

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### Suppliers

Writing prompt below. Be sure to replace text on this page.
*List your suppliers and their prices, terms and conditions. Describe any alternative arrangements you’ve made in case those suppliers can’t fulfill your order.*

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## FINANCIALS

Writing prompt below. Be sure to replace all text on this page.
*Include a high-level summary of your current and projected financials. Consider working with a trusted financial professional on this section of your business plan.*

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### STARTUP COSTS

Be sure to replace all text in this section. *If this is a plan for a new idea-stage venture, calculate and list your startup costs. Refer to this* [*article*](http://www.toryburchfoundation.org/resources/finance/estimating-start-up-costs/) *for guidance.*Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec elementum enim et urna egestas mattis. Donec libero ex, volutpat sit amet ipsum sed, rutrum mollis turpis. Donec iaculis nunc lorem, sit amet mattis felis finibus eu. Pellentesque ante erat, scelerisque eget velit id, efficitur aliquam nibh. Aenean in consequat leo. Ut sem nibh, rhoncus facilisis condimentum a, ornare ac nisi.

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## INCOME STATEMENT

Below is a field to attach files (.jpgs or Microsoft Excel) or paste tables. Be sure to replace all text in this section. *Also known as a profit and loss statement. Attach 2-3 years of income statements, if applicable. You may also consider attaching financial documents as an appendix item.*

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### Income Statement (Continued)

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### Income Statement (Continued)

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## CASH FLOW STATEMENT

### Cash Flow Statement Assumptions

Below is a field/feature to attach files (Jpgs or Microsoft Excel) or paste tables. *Briefly explain your cash-flow status (whether your business will have a cash flow problem next month, etc.) and how you might address a potential issue. You may also consider attaching financial documents as an appendix item.*

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### Break-Even Analysis

Below is a field/feature to attach files (Jpgs or Excel) or paste tables. *Briefly explain how many units sold or services provided your company will need to sell in order to break even during a selected time frame. You may also consider attaching financial documents as an appendix item.*

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## BALANCE SHEET

Writing prompt below. Be sure to replace all text in this section. *Include your company’s balance sheet, a financial document that shows your assets and liabilities at a glance and helps someone determine the equity, or value, of your company. You may also consider attaching financial documents as an appendix item.*

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### Balance Sheet (Continued)

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### Balance Sheet (Continued)

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## FINANCIAL PROJECTIONS

Writing prompt below. Be sure to replace all text in this section.
*Add your projected financials here. Be sure this matches your funding request. Idea-stage businesses should include monthly cash flow projections for the first two years or until they achieve profitability (whichever is longer), plus balance sheet and profit and loss projections for the first three to five years.*

*Click*[***here***](http://www.toryburchfoundation.org/resources/starting-a-business/create-your-business-plan-financial-projections/) *for additional advice on preparing the financial projection section for a more established business. You may also consider attaching financial documents as an appendix item.*

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### Balance Sheet Assumptions

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*Using your current financials and knowledge of your upcoming year, forecast your company’s net worth at the end of the fiscal year.*

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| Add your mission statement here. |

**First Name, Last Name**

Owner

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