

**Dear Applicant:**

**The mission for the Battle Creek Unlimited (BCU) Direct Investment Fund is to use Battle Creek's economic development investment funds to create and retain jobs in Battle Creek. We are pleased to have the opportunity to be of service to you.**

**The BCU Direct Investment Fund makes loans from \$30,000 to \$500,000 to a wide variety of businesses. No single application form can meet the needs of all applicants. The following checklist is designed to help the BCU staff guide you in preparing an application, which can receive prompt consideration by the BCU Direct Investment Fund Committee. All loan request approvals are communicated in writing by authority of the BCU Direct Investment Fund Committee.**

**If you have any questions about your application, please feel free to call the BCU staff at any time.**

**All applications require:**

- A) "Applicant Information Sheet."**
- B) The "Executive Summary" form.**
- C) The personal financial statement(s) of persons holding a majority interest in the company.**

**In addition, please provide the information marked below:**

- 1) \_\_\_\_\_ Current year interim corporate financial statement.**
- 2) \_\_\_\_\_ The past three years financial statements or tax returns.**
- 3) \_\_\_\_\_ A cash flow projection covering future periods as indicated: (worksheet included)**
- 4) \_\_\_\_\_ A business plan outlining basic strategy**
- 5) \_\_\_\_\_ A proforma balance sheet for future periods as indicated: (worksheet included)**
- 6) \_\_\_\_\_ Brief resumes of key people.**
- 7) \_\_\_\_\_ A description of equipment collateral**
- 8) \_\_\_\_\_ Other:**

**Thank you for your application.**

**Sincerely,**

**Lisa Albrant, Managing Director  
BCU Direct Investment Fund**