



934 S. Flintridge way * Anaheim Hills * California 92808 USA* Office: (714) 439-9600
Email: cm-group@sbcglobal.net * www.cm-group.com * Skype: ray.shah2

Initial Inquiry Form

CMG works with CEO/Management of Businesses and facilitates definition of business model, improves the same, if necessary, and then creates Investment Grade Business Plan and Presentation Package with a view to make the business lendable. The final professionally prepared information package is then presented to a screened list of Banks/companies/institutions/Investors to organize the necessary business loan/investment. It is important for you to fill out all the fields as accurately as possible to process your loan/equity request. All the information with CMG will remain confidential and it will be utilized only to organize investment and guarantees as per the written agreement to be signed with the client.

Please fill out & email to Capital Management Group Email: cm-group@sbcglobal.net

I. PROJECT SUMMARY TO BE COMPLETED BY BUSINESS CLIENT

Full Name: _____ Title: _____

Company Name: _____

Complete Address: _____

City: _____

Zip Code: _____

State: _____

Country: _____

Contact: _____

Tel #: _____

Title: _____

Fax #: _____

Cell Phone: _____

Email: _____

Education of the Principal: _____

Website Address: _____

Credit history of principal: Excellent Good

Credit history of Business: Excellent Good

Fair Poor

Fair Poor

Past/Current Litigations?: _____

No. of years of experience in the industry: _____

If yes, give details: _____



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II. A. Month and year Business license taken: _____

Any patent or technical tie-up?: _____

Funds Required for: [] Start-up Project

No. of employees at present: _____

[] Existing Business [] Acquire Business Partnership

No. of employees in 12 months: _____

[] Independent Expansion/Project Diversification

B. TOTAL FUNDS

Total Project Cost: US\$ _____

Promoter's Equity from US Partner(if any organized at present): US\$ _____

Balance Amount of Funds Needed: US\$ _____
as on today

Promoter's Equity from Local Partner(already organized or committed): US\$ _____

(Total Project cost Less Promoter's Equity Less Funds organized as on today)

Long Term Loan Term: _____ years

What Cash Funds are available US\$ _____

Short Term Loan Term: _____ years/months

Cash amount invested in the project: _____
as on today

Normally 30% or more of the project cost as promoter's equity is recommended. This can be relaxed for existing, profitable businesses or if bank guarantee or other security/references acceptable to the lender are given. If you require CMG to organize promoter's equity, please state so below.

C. PRIMARY SECURITY OFFERED: _____

ADDITIONAL COLLATERAL OFFERED: _____

Will you provide guarantee for repayment of loan?: Please specify _____

HOW COMMITTED ARE YOU TO THIS PROJECT? What is the current status of your project?

How much time you have to organize these funds? : _____

D. Please specify what you are trying to do: _____



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III. No. of months to Revenue Generation: Already in revenue since _____ OR will generate revenue in _____ months.

Customers & Product/Services that generate revenue: _____

Use of funds (Project Cost Break-up):

Land & Building _____, **Machinery & Equipment** _____,

Marketing _____ **Working Capital** _____, **Other** _____

AUTHORIZED SIGNATURE (S)

1. _____ 2. _____

Company Name: _____ **Date:** _____

**Please complete and email the signed (pdf or Jpg) form to Capital Management Group
Email: cm-group@sbcglobal.net**