



Anaheim Hills, CA 92808 * Office: (714) 439-9600
Email: cm-group@sbcglobal.net * www.cm-group.com * Skype: ray.shah2

Initial Inquiry Form (This form is submitted to CMG to create CMG custom proposal for the client).

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. All the information with CMG will remain confidential and it will be utilized only to provide services 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: _____ Skype ID: _____

Cell Phone: _____ Email: _____

Education of the Principal: _____ Website Address: _____

Credit history of principal: Excellent Good
 Fair to Good Fair Poor

Credit history of Business: Excellent Good
 Fair to Good 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 Multiple

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
(Total Project cost Less Promoter's Equity Less Funds organized committed): US\$ _____
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 for start-up project. This can be relaxed for existing, profitable businesses or other security/references acceptable to the lender are given.

C. PRIMARY SECURITY OFFERED: _____

ADDITIONAL COLLATERAL OFFERED: _____

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 _____

IV. What would you like to accomplish through CMG:

Needs Analysis Investment Grade Business Plan Due Diligence Package
(Start-up Expansion)

Obtain Letter of Commitment from Bank/Lender Disbursement of Funds
 Loan Working Capital

Plan to Improve Profitability Monitor Ongoing Performance Improve Cash-Flow Diversification

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**