



5. Do you own or lease land, building or equipment? Where are they located?

If you lease or rent, what is your monthly payment?

6. Company Management

<b>Name</b>	<b>Title</b>	<b>Ownership</b>
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**Please report your employment trends:**

7. Number of employees	last year	this year	next year
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8. Please report your average hourly wage for production workers:	
entry level	after 2 years

9. Are the employees organized and if so, what union represents them?

10. Describe what you consider to be the top five problems/challenges in your company. Briefly explain each and what you think the solutions are:

11. Have you previously sought business assistance or advice and if so, what type and with whom?

## Financial information

1. How is your company financed (bank loans, personally, equity, line of credit, etc.)? Do you consider your company to be adequately capitalized?
2. Please provide a brief historical financial summary of your company, covering the most recent complete year and previous three years.

	Year [1]	Year [2]	Year [3]	Year [4]
<b>Indicate year</b> (e.g., 2012)				
<b>Sales</b>				
<b>Gross margin</b>				
<b>Profit or (loss) before taxes</b>				

In addition, describe the financial history of your company.

3. What is your major financial concern? Explain.

4.

Name of bank	telephone
Loan officer	telephone
Type of account (line of credit, checking, note payable)	
Attorney	telephone
CPA	telephone
Other consultants regularly used:	
Name	telephone
Name	telephone
Name	telephone

5. SIC/NAICS code(s)

6. Please give your perception of your company's "strengths" and "weaknesses."

	<b>Strength</b>	<b>Weakness</b>	<b>Unsure</b>
General management			
Financial management			
Marketing			
Sales management			
Customer service			
Production management			
Information systems/computers			
Workforce			
Sources of supply			
Diversified customers			
Facilities/equipment			
Adequate capital			
Up-to-date technology			
Government regulation			
Cost structure			
Profitability			

*\*double check "greatest strength" and "greatest weakness."*

# Release

Date:

Between:

“Company”

And: **State of Oregon**, acting by and through its  
Business Development Department  
775 Summer Street NE, Suite 200  
Salem, OR 97301-1280

In consideration of Company receiving assistance and advice from Oregon Business Development Department or advisors under contract to Oregon Business Development Department, Company voluntarily and knowingly executes this Release with the express intention of extinguishing the obligations designated herein.

Company, with the intention of binding itself, its legal representatives, successors and assigns, expressly releases and discharges Oregon Business Development Department, its legal representatives successors and assigns, and Oregon Business Development Department's employees, agents or contractors from all claims, demands, actions, judgments and executions that Company ever had, or now has, or may have, known or unknown, or that anyone claiming through or under it may have, or claim to have, against Oregon Business Development Department, its legal representatives, successors and assigns and Oregon Business Development Department's employees, agents or contractors created by, or arising out of Oregon Business Development Department's provision of assistance and advice to Company.

In witness whereof, Company has executed this Release on the day and year first above written.

Name of Company

Company Official (Please Print)

By

Title



775 Summer Street, NE, Suite 200 • Salem, OR 97301-1280  
503-986-0172 • Fax 503-986-0164 • Web [www.oregon4biz.com](http://www.oregon4biz.com)

March 2013



## **Borrower and Lender Acknowledgement Funding Sources and Promotions**

Business Oregon can access and disburse funds from multiple state and federal funding sources. Highlighting successful projects and businesses helps demonstrate to the public the positive impacts of these programs and also helps to attract and encourage new applicants. As part of providing funding, the state of Oregon, Business Oregon and affiliated state agencies may use your company in the future promotion of their programs and services. The following typifies the information used in promotional materials:

- business name
- private lender name
- general description of the project
- total project cost
- amount of the state direct loan, guaranteed or program enrolled loan, or private activity bond issued
- projected number of new jobs created/retained as a result of the funding

Depending on program and project, the sources of funding may include, but are not limited to:

- Oregon State Lottery
- Oregon State General Funds
- Federal Economic Development Agency
- Federal State Small Business Credit Initiative (U.S. Treasury)

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Signature (Borrower)

Title

Date

**This completed Business Retention Service application should be mailed to:**

Business Finance Services  
Business Oregon  
775 Summer St., NE, Suite 200  
Salem, OR 97301-1280



### Demographic Questionnaire

To be completed by business owners or organizational executives. We encourage you to answer the voluntary demographic questions below. Answers to the questions will help Business Oregon track programmatic outcomes and deliver on our agency vision to advance economic opportunity for all Oregonians. Your responses will only be reported in aggregate. Aggregated data gathered over time may be used to inform future outreach to certain demographic communities or to help the agency think about new program design over time. Submission of this information is voluntary. The information, or declining to provide it, will not subject you to any adverse treatment and will have no impact on agency decision making regarding qualifications for any program or service. Please note that this information may be subject to public disclosure pursuant to Oregon Public Records Law.

Applicant Business or Organization Name

#### Personal Information

Owner Name

What is your business ownership percentage?

What is your race? Select all that apply  
American Indian or Alaska Native  
Native Hawaiian or Pacific Islander  
Other (please specify)

Asian  
White

Black or African American  
Prefer not to answer

What is your ethnicity? Select one:

Hispanic/Latino

Non-Hispanic/Latino

Prefer not to answer

Please describe your ancestry or national origin (example: Russian, Vietnamese, Somali, German, Hmong, Mexican, etc.)

Prefer not to answer

What is your gender?

Female

Male

Other (please specify):

Prefer not to answer

Are you a person with a disability, per the definition below?

The Equal Employment Opportunity Commission (EEOC) defines a covered disability under the Americans with Disabilities Act (ADA) as a physical or mental impairment that substantially limits one or more major life activities, a history of having such an impairment, or being regarded as having such an impairment.

Yes

No

Prefer not to answer

Have you ever served in the U.S. Armed Forces, Reserves, or National Guard (including currently)?

Yes

No

Prefer not to answer

Are you a member of a federally recognized tribe?

Yes (please specify)

No

Prefer not to answer