



Business funding brief

Start with what you know. Leave anything uncertain blank and bring your questions to the conversation.

Purpose of the funding and intended outcome

Amount required and my contribution

Required date and available quotes or invoices

Trading history and current commitments

Cash-flow forecast, including a slower period

Proposed security, guarantees or final payment

These are discussion notes, not a loan application or an affordability assessment. Keep this sheet private; do not record account numbers, passwords or identity-document details.

Your next useful checks

Tick what you have explored. Circle anything you want help to understand.

- ☐ Confirm the borrower and business structure
- ☐ Gather relevant financial records and forecasts
- ☐ Compare total cost, fees and repayment schedule
- ☐ Understand security and personal guarantees
- ☐ Plan for any balloon or residual payment
- ☐ Discuss tax and legal questions with advisers

Questions for the conversation

1. Does the structure fit the purpose and timing?

2. What happens if cash flow is weaker than expected?

3. How could the obligations affect my personal or home-loan plans?

Bring the question that matters to you.

[Choose a time with Chris](#) | 0448 010 999

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