

Business plan questionnaire for establishing a new business



Date:

Name: Date of birth:

Occupation:

Graduated from:

Registered on (date):

Details of experience:

.....
.....
.....

Details of your technique:

.....
.....
.....

Reasons why you wish to establish a new business:

.....
.....

Proposed location of the new business:

.....

Reasons for this location:

.....
.....

Contacts for networking in the local community:

.....
.....

Local population:

.....
Socio-economic profile of the local community:
.....
.....
.....

General description of the proposed practice building:
.....
.....

Number of rooms:

Size of building:

Clinic YES / NO

On site parking YES / NO How many car parks:.....

Car park surface:

Details of existing permits:

1. The building:

2. The car park:.....

3. Signs:

4. Number of practitioners permitted:

Contact the authorities and note their comments regarding your proposed use of the property as a clinic: (also note the names of the people you speak to):
.....
.....

Do you intend to rent? NO Purchase price \$

YES Term of lease

Options at lease expiry:

The monthly rental is \$:

Outgoings including rates, insurance, body corporate, sinking fund, etc:

.....
Does the lease have renewable options, percentage increase or market review?:

.....
What are the terms?:

.....
Is there a rent free period?: YES/NO months/years

Detail any improvements required to the property:

.....

.....

.....

.....

Estimated cost of these improvements: \$.....

Will the landlord contribute to these costs? YES/NO

If yes, give details:

.....

.....

Details of possible landlord contribution:

Have you obtained a detailed quote for the improvements?

.....
Details of the builder:

.....

Statement of financial position

Asset	Description	Current asset value	Financier & amount owing	Interest rate	Monthly payment
Your home		\$	\$	%	\$
Practice property		\$	\$	%	\$
Holiday home		\$	\$	%	\$
Investment property		\$	\$	%	\$
Investment property		\$	\$	%	\$
Investment property		\$	\$	%	\$
Practice goodwill		\$	\$	%	\$
Share portfolio		\$	\$	%	\$
Managed investments		\$	\$	%	\$
Superannuation (1)		\$	\$	%	\$
Superannuation (2)		\$	\$	%	\$
Motor vehicle (1)		\$	\$	%	\$
Motor vehicle (2)		\$	\$	%	\$
Cash at Bank (1)		\$	\$	%	\$
Cash at Bank (2) (Bonds)		\$	\$	%	\$
Tax savings account		\$	\$	%	\$
Wealth account		\$	\$	%	\$
Credit card debts		\$	\$	%	\$
Total		\$	\$		\$

Goals and objectives

Your professional goals	Your personal goals
Immediate	
Next twelve months	
Next five years	
Long term	

