

W3 –Company Advisors and Owner

Outside Advisors

Description	Name	Contact Information
CPA		
Banker		
Insurance Agent		
Marketing		
Industry Consultant		
Attorney		
Real Estate Agent		

Summary of Owner Industry and Business Experience

W3b – Additional Info – Owner Bio

Name: _____

The experience of the business owner is usually a key element of a successful business. An exception might be a franchise where the owner has not yet completed their training. For that type of case, list future plans for professional development with expected completion timeframe.

Business Related Experience and Training

Category	Experience and Training
Industry Related	
Sales and Marketing	
Managing or Supervising People	
Business Budgeting or Finances	
Other skills, experience or training	