



WAUBETEK
 Business Development Corporation
Investing in the Aboriginal Business Spirit
 A Community Futures Development Corporation



FINANCING APPLICATION – MARKETING PROJECT (Revised 2015)

HOW DID YOU HEAR ABOUT THE PROGRAMS AND SERVICES OF WAUBETEK?

Economic Development Officer		Signs	Word of Mouth (friends/family)	Waubetek Website
Outreach	Information Sessions	Waubetek Newsletter	Other (specify) _____	

This marketing guide is for Waubetek Marketing Contributions for project up to \$15,000. Those businesses requiring more funds may need to provide more information, please talk to one of our Business Development Officers. Eligible Marketing Projects over \$15,000.00 will receive a lower percentage of a 60% contribution.

APPLICANT INFORMATION:

Applicant Legal Name:	Business Operating Name:
Mailing Address:	Business Address (if different from mailing address):
Residence telephone number:	Business or Work telephone number:
E-mail and/or website address:	Fax number:

OWNERSHIP INFORMATION:

OWNERSHIP STRUCTURE:		Sole Proprietorship		Partnership		Incorporation		Other	
Applicant Legal Name	Heritage (please check one below)		Gender (circle)	% Owned	SIN (optional)	Date of Birth (dd/mm/yy)			
	Status	Non-Status					Male		
Metis	Inuit		Female						
Non-Aboriginal									
Status	Non-Status		Male						
Metis	Inuit		Female						
Non-Aboriginal									

Business Background : (outline: years in business, sales to date, human resources, other)

Executive Summary - The executive summary is a summary of your marketing project / plan (description of your ideas in promoting your product or service, and expected results).

Product or Service - Describe your products or service

Present Market - This section of the marketing plan will describe exactly who the customers are for the product or service (who typically buys your product or service i.e. Elderly, youth, off-reserve, teachers, etc.). Who are your Target Markets (target markets are normally defined in the following terms: Demographic (age income education), Geographic (location), Lifestyles (activities, interests).

Advantages of your product/service to your customers – Why are your customers buying from you?

How does that compare to your competition? Briefly detail who your competitors are and their marketing activities.

Marketing Objectives and Goals - Objectives and goals are the particular accomplishments that will be achieved as a result of the marketing plan (i.e. -new markets targeted). With this marketing project, what do you think will result in terms of new customers / clients (i.e. estimate increase or will you service a larger area?). Other accomplishments that will be achieved?

Marketing Strategy - This section will describe in detail how the objectives and goals will be met. It is also important to include suspected reactions of the competition to the implemented strategies.

Budget - Itemized cost for each marketing activity. (please attach cost quotes from suppliers)	
Activity	Cost:
1	\$
2	\$
3	\$
4	\$
5	\$
6	\$
7	\$
Total	\$

Financing:

Applicant Investment @ 25% \$ _____

(Please confirm your cash towards the project with your development officer)

Waubetek Business Development Corporation @ 75% \$ _____

Total Marketing Budget \$ _____

Timeline for Marketing Project: Describe by month when each proposed activities will be undertaken.

Financial Information: provide recent financial statements for your business and outline the benefits of this marketing strategy on your revenue.

Revenue last year \$ _____ Expected revenue after marketing strategy \$ _____

APPLICANT CHECKLIST:	Yes	No	N/A
Attach identification. This includes: Birth Certificate, Aboriginal Ancestry (Certificate of Indian Status, Metis Membership Card) and Driver's License (photocopy both front and back).			
Provide proof of cash equity in the form of bank statement. Date of statement (dd/mm/yy) _____ Amount available (\$) _____			
Attach copies of the past three (3) years of financial statements if this is an existing business.			
Provide written cost quotations from the supplier for any costs greater than \$1,000.00. The quote must contain business address, phone number and price.			

DECLARATION:

I (We) certify that all information given in this application is true and complete.

I (We) authorize the Waubetek Business Development Corporation to obtain from and share with persons or organizations, public or private, any information necessary to complete the assessment of the project outlined in this application.

I (We) authorize the right of access to Indian and Northern Affairs Canada officials to any of my client files maintained by the Waubetek Business Development Corporation.

I (We) authorize the Waubetek Business Development Corporation to audit the records of my business during the term of my agreement with Waubetek.

I (We) understand that any false information given in this application and any accompanying materials may result in the rejection of this application or the immediate demand for the repayment of the loan in full with any interest accrued thereon.

I (We) authorize Waubetek Business Development Corporation to verify the information provided on this application as to my credit and employment history.

Please Print Name of Applicant

Signature of Applicant

Signed at _____ this _____ day of _____, 20____.

(location) (day) (month) (year)

Once this application is complete...mail or fax to Waubetek.

For further information or assistance with this application, please contact our office at:

Waubetek Business Development Corporation
P.O. Box 209, Birch Island, Ontario P0P 1A0
Phone: (705) 285-4275
Fax: (705) 285-4584
E-mail: waubetek@waubetek.com
1-800-665-2248

For office use only:

Date Application Received by Waubetek	Receiver's Initials	Business Location	BDO Initials
_____ Month / Day / Year			