



**2015 Getting Down to Business Program
New Orleans, LA**

*Small Business Individual Development Account Program
A matched savings program for qualified small businesses*

Deadline to Submit: Monday, April 27, 2015

Participant Information

Name: _____

Home Address: _____

City: _____ State: ____ Zip Code: _____

Personal Cell Phone: _____

Personal Email Address: _____

Business Name: _____

Business Address: _____

City: _____ State: ____ Zip Code: _____

Business Phone Number: _____

Business Email Address and/or Business website:

Primary Goods/Services sold: _____



Application Questions and Requirements

PART A. Please answer the following questions

1. **Business Duration** – To qualify for this program you must have an active established business that has been in existence for at least 12 months. Have you been in business for at least 12 months?

Yes ___ No ___

If yes, for how long? _____

2. **Business Revenue** – To qualify for this program your annual business revenues must be less than \$1 million. Are your annual business revenues less than \$1 million?

Yes ___ No ___

3. **For-Profit Organization** – To qualify for this program your business must be an organized for-profit. Is your business an organization for-profit?

Yes ___ No ___

4. **Organization Type** – Are you a sole proprietor, limited liability company, corporation, or partnership? **NOTE: If partnership, partners must authorize approval to participate by attaching a simple statement to this application and note the percentages of each partner.**
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5. **Majority Owner** – Are you the majority owner?

Yes ___ No ___

6. **Current Age** – To qualify for this program you must be at least 18 years old. Are you at least 18 years old?

Yes ___ No ___

7. **Conflict of Interest** – Are you or an employee, affiliate, or relative of an employee of Capital One Financial Corporation or any of its affiliates, the Louisiana Small Business Development Center, or Money Management International? **NOTE: Relatives and employees are ineligible for participation.**

Yes ___ No ___

8. **Citizenship** – Are you a U.S. Citizen or legal resident?

Yes ___ No ___

9. **Savings Account** – Opening a savings account at Capital One National Association (“Capital One Bank”) is a prerequisite. Do you object to opening a savings account with Capital One Bank?

Yes ___ No ___

10. **Commitment** – The Getting Down to Business is an 8 month commitment. As part of the program you will be required to meet with your LSBDC advisor at least once a month and a Money Management International advisor at least twice during the program. Do you commit to completing the entire 8 month program with all of its requirements?

Yes ___ No ___

PART B. Please attach the following items with this application package.

1. **Business Plan** – Submit a Business Overview Summary (which may include a business description, business strategy, types of products/services, strengths/weaknesses, future goals, and such **that is no more than two (2) pages long.**
2. **DBA Permit** – Submit a copy of your DBA (Doing Business As) Permit, Certificate of Formation, or other corporate organizational filings with the applicable Secretary of State’s office.

NOTE: If you do not have this permit or certificate, you may attach a brief explanation regarding why it does not apply.

3. **Financials** – Submit a copy of your most recent Tax Return (preferably 2013 or 2014), Financial, Profit and Loss (P&L) and Balance Sheet.

PART C. Tell us about your business: (Please attach no more than two (2) pages)

1. **Program Benefits** – What three (3) principle objectives would you want to get out of this program?
2. **Versus Others** – Why should your small business be selected over others?

Additional Terms

By agreeing to participate in GDTB you hereby agree to complete and sign an Affidavit of Eligibility and Liability Release and where legal, a Publicity Release, and a W9, participants consent to the use of their names, likenesses, voices and/or biographical information for advertising and promotional purposes without additional compensation, except where prohibited by law. All participants agree to release and hold Capital One, its affiliates, subsidiaries, and each company’s respective officers, directors, employees, independent contractors, representatives, and agents (“Releasees”) and GDTB sponsors harmless from and against any claim or cause of action arising out of participation in the GDTB Program or the receipt, redemption or use of any program incentive, including any injuries or damages of any kind sustained in connection with the use, acceptance, possession or awarding of any program incentive.

INTELLECTUAL PROPERTY: Any materials produced by participants as part of the Getting Down to Business Program (GDTB) are deemed to be the Intellectual Property of the Participant. Business Plans and materials submitted to GDTB, however, will not be returned. Participant represents and warrants that: (1) all Business Plan contents and any other materials submitted are the original work of the Participant, unless otherwise clearly and specifically noted in the Business Plan, (2) that none of the Business Plan’s contents infringe upon the intellectual or property rights of any other party; and that (3) all statements are, to the best of Participant’s knowledge, true and accurate.

Signature

Date

Program Dismissal

Please acknowledge that you can be dismissed from the program and/or be disqualified for the match dollars for any of the following reasons at the sole discretion of the program administrator:

- Excessive tardiness (3 or more times)
- Missing more than one scheduled class
- Missing a class without contacting the program administrator prior to the start of class
- Not meeting with your LSBDC advisor at least once a month
- Missing any of the 2 mandatory Money Management International sessions (dates will be provided)
- Refusal or inability to open a new Capital One Bank small business savings account by the date determined by the program administrator
- Any misrepresentation of one’s self or business no matter at what time it is discovered.

Signature

Date

Attestation

I hereby attest that the information I have provided in this application, both in answers to stated questions and in attachments, is truthful and accurate.

Signature

Date

Please copy this application so that you have a copy for your records before you submit it.

NOTE: if you are called for an interview, please be ready to discuss Part B #1, and Part C.

Submit all pages of this application and all required attachments by **Monday April 27, 2015**

by email:

to Lauren Polson at lpolson@lsbdc.org

or by mail to:

Lauren Polson

Louisiana Small Business Development Center
3330 N. Causeway Blvd, Suite 422
Metairie, LA 70002

or by fax at:

504.831-3735

Please call Lauren Polson at 504.343.9874 if you do not receive email confirmation that we have received your application within 24 hours of submission.

If you have questions, please contact:

Lauren Polson
Executive Assistant, Louisiana Small Business Development Center
504.343.9874 or lpolson@lsbdc.org

Mark Boucree
Vice President, Community Development Banking, Capital One Bank
Mark.Boucree@capitalone.com

Carmen Sunda
Director, Louisiana Small Business Development Center
504.202.6752 or csunda@lsbdc.org

*Thank you for your interest in the 2015 class of
Capital One Bank's
Getting Down to Business Program
in New Orleans, LA!*