



# Moneysprites

*Funding the Future*

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## AGENT INFORMATION

Name

Email

Date/ location  
of conversation

How do you  
know this prospect?

Can you share any interesting info about this prospect/ business so we can  
get to know them?

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## COMPANY INFORMATION

Company Name

Website

Contact Name

Is contact the  
Business owner?

If no, is contact authorized by the owner to seek financing?

Contact Email

Phone

Company Size

Industry

Years in Business

Business sells to

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## FINANCES

Average monthly gross sales

Gross sales year to date

Gross sales last year

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## HOW CAN WE HELP?

How much are they seeking to borrow?

What is the intended use of funds?