



BUSINESS PERFORMANCE REVIEW Client Form

Statement on use of Information

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Please complete this form and attach the appropriate supporting documentation as outlined in the letter/email accompanying this form. Please return the form and supporting documentation to AANDC by the due date.

Project Information

Arrangement Number	Transaction Activity Number	Information/Data as of (YYYY-MM-DD)
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Client Contact Information

Business	Contact
Client Name	Name
Address	Address (If different)
Telephone Number	Telephone Number
Facsimile	Facsimile
Email Address	Email Address

Business Performance Information

1. What is the current status of the business?

- In operation (If checked, go to question 2)
- Not in operation (If checked, indicate date and reason below)

Business not in operation as of (YYYY-MM-DD) _____

- Bankrupt Ceased Operation Sold/Transferred Other _____

2. Record the following financial data for the past fiscal year (e.g. \$1,234).

A) Income Sheet

Total Sales/Revenue _____

Total Net Profit/Income _____

B) Balance Sheet

Total Assets* (A=L+OE) _____

Total Liabilities _____

Total Equity _____

* As per Generally Accepted Accounting principles (GAAP): Assets (A) = Liabilities (L) + Owner's Equity (OE).

3. Record the following employment data for the past fiscal year. Full-time employees are those that worked more than 30 hours per week and part-time employees are those that worked less than 30 hours per week. (If zero, please indicate.)

A) Number of full-time (F/T) employees (including owner):

Aboriginal (including the owner): _____ F/T employees Non-Aboriginal: _____ F/T employees

B) Number of part-time (P/T) employees:

Aboriginal: _____ P/T employees Non-Aboriginal: _____ P/T employees

C) Total Number of employees (A + B): _____

D) Total gross wages and salaries (annual wages NOT hourly) _____

4. Please indicate the internet connectivity of your business and its use of the information technology. (Check all that apply to the following statement).

"My business has:"

- access to the internet (If NOT checked go to question 5)
- a website
- online sales of products and/or services via the corporate website (e-Commerce)
- purchased products and services online

5. What percentage of your total sales were made: (Note: All should add up to 100%)

- A) in your local community? _____ %
- B) in other parts of your province or territory? _____ %
- C) in other provinces or territories? _____ %
- D) outside of Canada? (i.e. exporting) _____ % (if greater than zero go to D.1, otherwise, go to D.2)
- Total ► 100 %

Type of Exporting

- D.1 In the next two years, does your business intend to increase sales outside of Canada? Yes No
- D.2 In the next two years, does your business intend to expands its client base markets outside of Canada? Yes No

6. Overall, how would you rate the success of your business in the past two years? (Check only one)

- Excellent
- Good
- Fair
- Poor

7. A) Rate the importance of each of the following factors in meeting the overall objectives of your business. (*Select only one for each factor*).

1. NOT AT ALL IMPORTANT 2. NOT VERY IMPORTANT 3. SLIGHTLY IMPORTANT 4. IMPORTANT 5. VERY IMPORTANT

	1	2	3	4	5	N/A
Management Skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to effectively use technology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Research and Development and Innovation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Human Resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing/Commercialization	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Production	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Competitive Strategy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board of Directors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accounting Controls	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

7. B) Project to what extent the following obstacles would be in growing your business for the next two years? (*Select only one for each obstacle*).

1. NOT AT ALL 2. ONLY A LITTLE 3. MORE THAN A LITTLE 4. A FAIR AMOUNT 5. A GREAT DEAL

	1	2	3	4	5	N/A
Access to funding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cost of borrowing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to equity or capital	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trade regulations or exchange rate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Competition	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Availability of skilled labour	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cost of doing business (e.g. raw materials, supplies, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall economic conditions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall market conditions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to technical assistance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Taxes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Government policy/rules and regulations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Infrastructure, such as telephone, electricity, water, roads, lands	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Would anything else present an obstacle in growing this business (<i>Specify</i>)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

8. Comments/Any issues that you would like to bring to ABC's attention.
