



INVESTING IN A GREEN AND HOLISTIC WORLD

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Executive Summary Form and Application for Clean Tech and Renewable Energy Projects

\$4,750 Initial Fee must accompany this application

Minimum Funding amount five million dollars (\$5,000,000.00)

Minimum of \$20,000 due for domestic projects when and if application is accepted (Retainer)

Minimum of \$39,750 due for overseas projects when and if application is accepted (Retainer)

Entity/Project/Business To Be Financed

Name: _____

Street Address: _____

City, State, Zip Code: _____

Phone numbers (office, cell): _____

Fax number: _____

Email address: _____

Primary Contact Person

Name: Mr. _ Mrs. _ Ms. _ _____

Street Address: _____

City, State, Zip Code: _____

Business name: _____

Phone numbers (office, cell): _____

Fax number: _____

Email address: _____

Secondary Contact Person

Name: Mr. _ Mrs. _ Ms. _ _____

Street Address: _____

City, State, Zip Code: _____

Business name: _____

Phone numbers (office, cell): _____

Fax number: _____

Email address: _____

If not, what additional development is required?

Is Property or machinery owned or controlled? (if applicable)

(If not currently owned, is property or machinery controlled under contract? Please elaborate.)

Last Appraised Value of Real estate, machinery, patents

Date of appraisal

\$ _____

Current “as is” value of Real estate, machinery, patents?)

\$ _____

Anticipated “as completed” appraised value of Real estate, machinery, patents?)

\$ _____

Purchase Price (If applicable)

Date of purchase

\$ _____

Types of Financing Requested

(Specify debt financing, equity, debt-equity combination, joint venture, etc. Multiple choices may be specified.)

Amount Requested

\$ _____

Cost Budget of Project

(Breakdown the total amount of development costs; hard and soft. Include cost of real estate if purchasing, and all machine, or manufacturing equipment.)

Applicant's Money/Equity Invested

(How much capital has been invested into the project to date? Include hard and soft cost expenditures as well as equity in machinery, patents and real estate.)

Principals Names, Addresses, DOB's and SS#'s

(The applicant(s) name should go here, plus any other principals or personal guarantors.)

Credit Score(s) for all Principals

(If known)

Net Worth of Principals(s)

Current Liquidity of Principals(s)

Current Revenue (if any) being generated from Project

Experience of Management Team

(Previous development projects, etc.)

Market Definition

(How large is your market? Do you understand it and can you define it?)

Marketing Plan

(Show a well thought out plan. Multiple aspects/components are a plus.)

Financial Information and Exit Strategy (Last 3 years Tax Returns and/or 2019 P&L)

(Show how you will be able to make the payments to fully pay back a loan; for example, cash flow information/gross and net annual income can be included here. Will payments be made from rents, profits, prepaid interest, or other sources? This should be a condensed summary of the project's financial projections, preferably for 4 or 5 years, for the main financial categories: Revenues, Expenses, and Income/Profit. ***If project is residential development, please list percentage of pre-sales to date.**)
