

Local Investing Opportunities Network
Connecting Local Individuals and Businesses with Investors

Investing Opportunity Submission Form

Thank you for submitting your Investing Opportunity to the Local Investing Opportunities Network (LION) of East Jefferson County, Washington. LION creates opportunities for local individuals and businesses to connect with local investors to build prosperous local businesses, keep investing money in our community, and help build a more resilient and sustainable economy in Jefferson County. We look forward to working with you.

Please complete this form and return it along with any related documents to the LION Contact Person noted below. Please do not hesitate to contact him with any questions about LION, LION members, or the investing opportunity submission process.

LION Contact Person: James Frazier – james (at) confiso (dot) com - (360) 379-0295
Address: 2023 E. Sims Way #312, Port Townsend, WA 98368

Personal Contact Information:

Name of Owner/Borrower: _____

Name of Co-Owner/Borrower: _____

Mailing Address: _____

Day Telephone: _____

Evening Telephone: _____

Cell Phone: _____

Owner/Borrower E-Mail Address: _____

Co-Owner/Borrower E-Mail Address: _____

Business Contact Information: (If Applicable)

Business Name: _____

Address: _____

Telephone: _____

E-Mail Address: _____

Investing Opportunity Information:

NOTE: Questions on this page may be skipped if the information requested is contained in a separate Business Plan or Investing Opportunity Summary. Please do not include tax returns or other highly sensitive personal or confidential financial information.

Name of your Investing Opportunity (few words): _____

Brief description and history of your Business and/or Investing Opportunity: _____

Current financial situation of the business and/or borrower (Attach recent financial statements and projected income and expenses, if possible and not highly sensitive):

Total amount and terms requested for loan or investment (Please include desired number of investors and minimum amount per investor, if any):

Intended use of funds sought: _____

Other loans or investment funds applied for: _____

Advisers & References:

Please list the professional adviser(s) you consulted with on this Investing Opportunity:

Adviser #1 Name and/or Business: _____

Address: _____

Telephone: _____

E-Mail Address: _____

Adviser #2 Name and/or Business: _____

Address: _____

Telephone: _____

E-Mail Address: _____

Please list at least two local references:

Name #1: _____

Address: _____

Telephone: _____

E-Mail Address: _____

Name #2: _____

Address: _____

Telephone: _____

E-Mail Address: _____

Confidentiality:

To what extent is this Investing Opportunity known publicly? _____

Please describe any plans you have to offer this Investing Opportunity to others outside LION.

May LION members circulate this Investing Opportunity outside LION at their personal discretion, or do you request that LION members keep your Investing Opportunity confidential?

OK to Circulate Keep Confidential

LION Referral & Relationships:

How did you hear about LION? _____

Name(s) of LION Member(s) you know: _____

Agreement:

- 1) I/we hereby give the Local Investing Opportunities Network ("LION") permission to circulate this form and all other documents I/we have submitted within the LION group (and if I/we have specified, among others outside LION as well);
- 2) I/we acknowledge that the confidentiality of submitted documents is not guaranteed, even if requested; and
- 3) I/we hereby release LION and its members from liability to the fullest extent of the law.

Owner/Borrower Signature

Owner/Borrower Printed Name

Co-Owner/Borrower Signature

Co-Owner/Borrower Printed Name

Date