**Investment Proposal Template Word**

## **Proposal Title: [Project/Business Name]**

**Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

## **Submitted By:**

**Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Company Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

## **Submitted To:**

**Investor Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Company (if applicable): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

## **Executive Summary**

**[Business Name] presents this investment opportunity to [Investor’s Name]. This project focuses on [Industry/Product], with high growth potential and scalable opportunities.**

## **Investment Request**

**We are seeking $[Amount] to fund [Project/Expansion], offering [Equity/Profit Share] in return.**

## **Use of Funds**

1. **Product Development - [Percentage of Funds]**
2. **Marketing & Branding - [Percentage of Funds]**
3. **Operational Costs - [Percentage of Funds]**
4. **Other Expenses - [Percentage of Funds]**

## **Market Opportunity**

**The industry is projected to grow at [Growth Rate], and our company is uniquely positioned to capitalize on this growth due to [Competitive Advantage].**

## **Financial Projections**

| **Year** | **Revenue** | **Profit** | **ROI (%)** |
| --- | --- | --- | --- |
| **2024** | **$\_\_\_\_\_** | **$\_\_\_\_\_** | **\_\_\_%** |
| **2025** | **$\_\_\_\_\_** | **$\_\_\_\_\_** | **\_\_\_%** |
| **2026** | **$\_\_\_\_\_** | **$\_\_\_\_\_** | **\_\_\_%** |
| **2027** | **$\_\_\_\_\_** | **$\_\_\_\_\_** | **\_\_\_%** |

## **Exit Plan**

**Possible exit strategies include IPO, Merger, Acquisition, or Stake Buyout.**

### **Agreement & Acknowledgment**

**☐ I agree to the investment terms and conditions.  
☐ I acknowledge this proposal’s financial details.**

**Investor Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**