

Business Owner's Records Portfolio

A Handbook for Entrepreneurs



United States
Department of
Agriculture

National Institute
of Food and
Agriculture

Business Owner's Records Portfolio

**Entrepreneurial Development Targeting Rural Hispanic Immigrants:
A Collaborative Research and Extension Effort**

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Employee Records

Use this page to list your employees' contact information.

Name: _____

Phone: _____

Address: _____

E-mail: _____

Emergency Contact: _____

Phone: _____

Address: _____

Name: _____

Phone: _____

Address: _____

E-mail: _____

Emergency Contact: _____

Phone: _____

Address: _____

Name: _____

Phone: _____

Address: _____

E-mail: _____

Emergency Contact: _____

Phone: _____

Address: _____

Name: _____

Phone: _____

Address: _____

E-mail: _____

Emergency Contact: _____

Phone: _____

Address: _____

Name: _____

Phone: _____

Address: _____

E-mail: _____

Emergency Contact: _____

Phone: _____

Address: _____

Name: _____

Phone: _____

Address: _____

E-mail: _____

Emergency Contact: _____

Phone: _____

Address: _____

Business Loan Documents

Use this page to list your business loan information.

Loan Information

Primary Financing

Lender: _____

Phone: _____

Address: _____

Contact name: _____

Initial amount of loan: _____

Initial interest rate: _____

Account number: _____

Secondary Financing

Lender: _____

Phone: _____

Address: _____

Contact name: _____

Initial amount of loan: _____

Initial interest rate: _____

Account number: _____

Taxes

Property description: _____

Current value: _____

Due dates: _____

Notes: _____



Business Owner's Records Portfolio

Inspection Records

Licensing Information

Insurance Records

Utilities and Services

Improvement Records

Appliances, Furnishings and Fixtures

Décor

Association Memberships

Business Inspection Records

This envelope should contain:

- All copies of initial inspections
- Copies of appraisal report

Type of Inspection:

Date of inspection: _____

Agency/company: _____

Inspector's name: _____

Address: _____

Phone: _____

Fax: _____

E-mail: _____

Appraisal of Property:

Date of appraisal: _____

Agency/company: _____

Appraiser's name: _____

Address: _____

Phone: _____

Fax: _____

E-mail: _____

Type of Inspection:

Date of inspection: _____

Agency/company: _____

Inspector's name: _____

Address: _____

Phone: _____

Fax: _____

E-mail: _____

Survey Information:

Date of survey: _____

Agency/company: _____

Surveyor's name: _____

Address: _____

Phone: _____

Fax: _____

E-mail: _____

License and Permit Information

Use this section to list all license and permit information pertaining to your business.

License/Permit:

License/permit number: _____

Issuing agency: _____

Date of issue: _____

Date of renewal: _____

Date of expiration: _____

License/permit fee: _____

Renewal fee: _____

Renewal process: _____

Agency address: _____

Phone: _____

Fax: _____

Website: _____

License/Permit:

License/permit number: _____

Issuing agency: _____

Date of issue: _____

Date of renewal: _____

Date of expiration: _____

License/permit fee: _____

Renewal fee: _____

Renewal process: _____

Agency address: _____

Phone: _____

Fax: _____

Website: _____

License/Permit:

License/permit number: _____

Issuing agency: _____

Date of issue: _____

Date of renewal: _____

Date of expiration: _____

License/permit fee: _____

Renewal fee: _____

Renewal process: _____

Agency address: _____

Phone: _____

Fax: _____

Website: _____

License/Permit:

License/permit number: _____

Issuing agency: _____

Date of issue: _____

Date of renewal: _____

Date of expiration: _____

License/permit fee: _____

Renewal fee: _____

Renewal process: _____

Agency address: _____

Phone: _____

Fax: _____

Website: _____

Insurance Records

This envelope should contain:

- Business liability insurance
- Business property insurance
- Employment practices liability insurance
- Excess liability insurance
- Fire insurance
- Health insurance
- Life insurance

• *If you improve your business, check with your agent to increase your coverage.*

• *Complete the **inventory of business-place** contents and place in a safe deposit or fireproof box.*

Business Liability Policy

Company: _____

Agent's name: _____

Address: _____

Phone: _____

Fax: _____

E-mail: _____

Policy number: _____

Deductible: _____

Coverage amount: _____

Total premium: _____

Fire Insurance

Company: _____

Agent's name: _____

Address: _____

Phone: _____

Fax: _____

E-mail: _____

Policy number: _____

Deductible: _____

Coverage amount: _____

Total premium: _____

Business Property Insurance

Company: _____

Agent's name: _____

Address: _____

Phone: _____

Fax: _____

E-mail: _____

Policy number: _____

Deductible: _____

Coverage amount: _____

Total premium: _____

Health Insurance

Company: _____

Agent's name: _____

Address: _____

Phone: _____

Fax: _____

E-mail: _____

Policy number: _____

Deductible: _____

Coverage amount: _____

Total premium: _____

Utilities and Services

This envelope should contain:

- Utility service contracts
- Service agreements

Electric Company: _____

Account number: _____

Phone number: _____

Emergency number: _____

Billing address: _____

Shutoff location: _____

Gas Company: _____

Account number: _____

Phone number: _____

Emergency number: _____

Billing address: _____

Shutoff location: _____

Internet Provider: _____

Account number: _____

Phone number: _____

Emergency number: _____

Billing address: _____

Phone Company: _____

Account number: _____

Phone number: _____

Emergency number: _____

Billing address: _____

Exterior jack location: _____

Waste Management: _____

Account number: _____

Phone number: _____

Emergency number: _____

Billing address: _____

Pickup days: _____

Pest Control: _____

Account number: _____

Phone number: _____

Emergency number: _____

Billing address: _____

Service cycle: _____

Cleaning Service: _____

Account number: _____

Phone number: _____

Emergency number: _____

Billing address: _____

Service cycle: _____

Water Company: _____

Account number: _____

Phone number: _____

Emergency number: _____

Billing address: _____

Business Improvements

This envelope should contain:

- Copies of estimates and contracts
- Receipts for materials and services

Contact your insurance agent to increase your coverage if you make any improvements to your business.

Improvement:

Date: _____

Total dollars: _____

Contractor: _____

License number: _____

Phone number: _____

Improvement:

Date: _____

Total dollars: _____

Contractor: _____

License number: _____

Phone number: _____

Improvement:

Date: _____

Total dollars: _____

Contractor: _____

License number: _____

Phone number: _____

Improvement:

Date: _____

Total dollars: _____

Contractor: _____

License number: _____

Phone number: _____

Improvement:

Date: _____

Total dollars: _____

Contractor: _____

License number: _____

Phone number: _____

Improvement:

Date: _____

Total dollars: _____

Contractor: _____

License number: _____

Phone number: _____

Business Association Information

This envelope should include:

- Association brochures
- Association codes
- Copy of membership application
- Current leadership roster

Association: _____

Date of membership: _____

Membership fee: _____

Annual fee: _____

Phone number: _____

Address: _____

Association: _____

Date of membership: _____

Membership fee: _____

Annual fee: _____

Phone number: _____

Address: _____

Association: _____

Date of membership: _____

Membership fee: _____

Annual fee: _____

Phone number: _____

Address: _____

Association: _____

Date of membership: _____

Membership fee: _____

Annual fee: _____

Phone number: _____

Address: _____

Association: _____

Date of membership: _____

Membership fee: _____

Annual fee: _____

Phone number: _____

Address: _____

Association: _____

Date of membership: _____

Membership fee: _____

Annual fee: _____

Phone number: _____

Address: _____

Inspections

Licensing

Insurance

Utilities

Improvements

Appliances

Décor

Associations

If using Wilson Jones 8 tab sheet protectors (Product No. W55115), please insert this page into the last sheet protector.

If using a different tab set, this sheet may be used for tab labels.

