

# Commence your Initial Private Offer

**TO HELP US PREPARE A DRAFT SHARE CAPITAL STRUCTURE FOR YOUR ENTERPRISE, PLEASE ANSWER THE FOLLOWING QUESTIONS.**

|          |                          |                                          |
|----------|--------------------------|------------------------------------------|
| <b>1</b> | <b>Applicant's Name:</b> | <input style="width: 75%;" type="text"/> |
|          | <b>Phone:</b>            | <input style="width: 60%;" type="text"/> |
|          | <b>Email:</b>            | <input style="width: 60%;" type="text"/> |

|                                                                                                   |                             |                                          |
|---------------------------------------------------------------------------------------------------|-----------------------------|------------------------------------------|
| <b>2</b>                                                                                          | <b>Full name of Entity:</b> | <input style="width: 75%;" type="text"/> |
| <i>The name, or proposed name, of the enterprise. May, or may not be a Company at this stage.</i> |                             |                                          |

|                                                                                                                                                                                                                    |                            |                                          |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------|------------------------------------------|
| <b>3</b>                                                                                                                                                                                                           | <b>Tell us your Story:</b> | <input style="width: 75%;" type="text"/> |
| <i>If you were to tell a story about your business, your business project or your investment opportunity, as you would to someone at a barbecue you were holding or at a family gathering, what would you say?</i> |                            |                                          |

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|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| <b>4</b>                                                                                                                                                                                                            | <b>Provide the current owners/founders names and the % of ownership held by each.</b> |
|                                                                                                                                                                                                                     | <input style="width: 95%;" type="text"/>                                              |
| <i>Please provide the names or pseudonyms of those who are considered to be the current founders/stakeholders of the enterprise, and the percentage (%) of ownership deemed (or considered) to be held by each.</i> |                                                                                       |

|          |                                                                          |                                          |
|----------|--------------------------------------------------------------------------|------------------------------------------|
| <b>5</b> | <b>What is the total amount of capital you are seeking to raise?: \$</b> | <input style="width: 40%;" type="text"/> |
|----------|--------------------------------------------------------------------------|------------------------------------------|

|                                                                                                                                                         |                                                                      |                                          |          |
|---------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------|------------------------------------------|----------|
| <b>6</b>                                                                                                                                                | <b>Percentage of ownership you are prepared to offer investors?:</b> | <input style="width: 15%;" type="text"/> | <b>%</b> |
| <i>Insert the percentage (%) of ownership equity in your Company that you will be offering to new investors in exchange for the funds being sought?</i> |                                                                      |                                          |          |

|                                                                                                                        |                                                                                                                          |
|------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|
| <b>7</b>                                                                                                               | <b>How do you propose your Investors will get their money back?</b>                                                      |
| <i>If your business achieves the goals you want it to, how do you expect your investors will get their money back?</i> |                                                                                                                          |
| <b>Note:</b> Please select the most suitable exit strategy below.                                                      |                                                                                                                          |
| <input type="radio"/>                                                                                                  | We already have a company in mind that will buy us, and we are strategically building our company for this.              |
| <input type="radio"/>                                                                                                  | We will sell the business on the open market to a third party.                                                           |
| <input type="radio"/>                                                                                                  | We will establish a web-based Private Trading Exchange (PTX) to enable Secondary trading in the Company's issued shares. |
| <input type="radio"/>                                                                                                  | We will list on a Stock Exchange through a Public Offering or Backdoor Listing                                           |
| <input type="radio"/>                                                                                                  | Not sure at this stage.                                                                                                  |

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## 8 Target market reach:

What is the proposed market reach or distribution of the company's products or services?

- Local
- National
- International

## 9 Anticipated earnings before Interest & Tax (EBIT):\$ Per annum.

Just numbers, no "," or "\$". Assuming you have already raised the funds you need and have implemented them in accord with your business plan. Give us the average annual EBIT (Earnings Before Interest and Tax) for the next projected 3 years. Calculate it this way please Year 1 EBIT + Year 2 EBIT + Year 3 EBIT = \$TOTAL. Then divide that number by three to give us a conservative estimate of the potential future average annual EBIT.

## 10 Stage of Growth:

Please select one option below that best describes the stage of development/growth that your enterprise is at right now.

- Idea/Research
- Proof of Principal
- Working Prototype
- First Sale
- Sales no Profit
- First Profit
- Growth Expansion Phase

## 11 What is your Preferred Share Pricing Structure?:

Depending on the amount being raised, would you prefer to have incremental price increases during the capital raise? As your raise progresses and you to reach each milestone objective, this can present an opportunity to increase the share price in subsequent rounds, for the balance you are seeking. This can encourage investors to get in early and can help build momentum in the raise.

- I would like to split our raise into 2 or 3 rounds with incremental share price increases.
- I want all the shares to be issued at the same price.

**What happens next?** You will be contacted soon by a representative of Austpac Ventures to set up a suitable time to go through the answers you have provided and input any changes or adjustments necessary to finalise a Strategic Growth Plan and Share Capital Structure for your Venture. Save & email the completed form to: [admin@austpacventures.com.au](mailto:admin@austpacventures.com.au) For more information on setting up a Private Trading Exchange for your Company's securities, [message us here](#).