

Methow Investment Network Investing Opportunity Submission Form

Thank you for submitting your Investing Opportunity to the Methow Investment Network. The Methow Investment Network creates opportunities for local individuals, businesses, and local investors to network, build prosperous local businesses, keep investing money in our community, and help build a more resilient and sustainable economy in the Methow Valley. We look forward to working with you. Please note that we only consider **local** investing opportunities, which is defined by our group as the Methow Valley.

Please complete this form and return it along with any related documents to the Methow Investment Network Investing Opportunity Contact Person. Do not hesitate to contact them with any questions about Methow Investment Network or the investing opportunity submission process. If you would like to have a conversation via phone, you may request one via e-mail or mail.

Methow Investment Network Investing Opportunity Contact Person

E-mail: hmcintosh@twispworks.org

Mailing Address: TwispWorks, 502 S Glover Street, Twisp, WA 98856

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 in this section 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 the Methow Investment Network.

Distribution:

Please specify to whom you wish to have your investing opportunity and related documents distributed by selecting one of the following three options:

- ☐ To all Methow Investment Network members
- ☐ To all Methow Investment Network members plus anyone else outside the Methow Investment Network whom any member feels might be interested
- ☐ Only to the following Methow Investment Network members:
- ☐ [Member 1 Name]
 - ☐ [Member 2 Name]
 - ☐ [Member 3 Name]
 - ☐ [Member 4 Name, etc.]

Methow Investment Network Referral & Relationships:

How did you hear about the Methow Investment Network? _____

Name(s) of Methow Investment Network Member(s) you know: _____

LEGAL DISCLAIMER:

Methow Investment Network offers no legal, investment, or financial advice, nor does Methow Investment Network itself solicit, offer, or recommend any investment opportunities. Methow Investment Network provides basic forms for the purpose of providing information about potential investments to eligible investors, but Methow Investment Network does not represent these forms to be anything more than general

identifying information. The actual investment information, documentation, and any other legal and/or regulatory requirements for any particular investment or financing transaction shall be the sole responsibility of the individuals, businesses, or other organizations directly involved, and to any appropriate professionals deemed necessary to effect such transactions. Every state has distinct laws and regulations regarding securities offerings, so the individuals, businesses, or other organizations involved are responsible for ensuring they comply with these and any other applicable laws and regulations. Methow Investment Network does not participate in any negotiations or solicitations for investment transactions, nor does it participate in the investment transactions themselves. Methow Investment Network exists solely to facilitate contacts between parties who provide local investing and financing opportunities, and eligible parties who may be interested in participating.

The fact that Methow Investment Network may facilitate submissions and/or distributions of information from individuals, businesses, and other organizations should not be construed as any sort of endorsement or approval of such submissions by Methow Investment Network or its members. Methow Investment Network does not examine or otherwise consider submissions beyond simply receiving them, checking them for basic identifying information, and forwarding them to the Methow Investment Network members who have been designated by the submitting individuals and/or entities. Methow Investment Network distributes investing opportunity submissions to its members according to instructions received by the submitting individuals and/or entities, and is made without investor qualification of any kind by Methow Investment Network itself. Any investor qualification is the sole responsibility of the submitting individuals and/or entities.

Methow Investment Network's activities shall not constitute an offer to sell, or the solicitation of an offer to buy, securities or any other investment or financing opportunity, document, or vehicle.

In making an investment or financing decision, investors or financiers must rely on their own examination of the issuer or maker, and the terms of the offering or other transaction or transaction documentation, including the merits and risks involved.

Prospective investors or financiers should not construe Methow Investment Network as providing legal, tax or financial advice. Each prospective investor or financier should consult his or her own professional advisors as to the legal, tax, financial or other matters relevant to the suitability of any investment or financing transaction or transaction documentation for such investor or financier.

Your Agreement:

1. I hereby give Methow Investment Network permission to circulate my business plan and/or investing opportunity documents among a) those Methow Investment Network members whom I have designated, b) all Methow Investment Network members, or c) all Methow Investment Network members who may redistribute these documents to others outside Methow Investment Network who may be interested;
2. I acknowledge that the confidentiality of submitted documents is not guaranteed, even if requested; and
3. I acknowledge, understand, and agree to the terms of the Legal Disclaimer (above). I hereby release Methow Investment Network and its members from liability to the fullest extent of the law.

If I am/we are completing this form via computer, my/our typed name(s) below shall be considered to have the same legal effect as my/our written signature(s).

Owner/Borrower Signature

Owner/Borrower Printed Name

Co-Owner/Borrower Signature

Co-Owner/Borrower Printed Name

Date