

Professional Office BizPrep

Welcome Letter

Business CEO:

We are looking forward to your school's visit to *JA BizTown* and hope that you and your team are as well. We know you are learning a lot about operating your own business and handling your own finances. Before long, you will be able to put your knowledge to work and, hopefully, see success for both yourself and your business.

You will find many important papers in this BizPrep Packet. All pages must be completed before coming to *JA BizTown* and must be brought with you on the day of your on-site visit. There are also several tasks to be completed in preparation for your visit. **Please use the checklist below to assure that all paperwork and tasks are completed and checked for accuracy.**

____ Business Cost Sheet

____ Loan Application

____ Radio Ad

____ Philanthropy Pledge Sheet

____ Employee Checkbooks*

____ Employee Name Tags (optional)

**Checkbooks are not used by every school. Check with your teacher and include the completed checkbooks in your BizPrep envelope, if instructed.*

Your signature at the bottom of this page indicates that your business team is ready for business. Thank you for handling this responsibility!

We look forward to seeing you soon,



Lena Yarian
President, JA of Northern Indiana

Our business has prepared each of the above items:

CEO'S Signature

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Business Cost Sheet

SALARIES

Student Name (First and Last Name)	Account #	Break	Salary	Periods	Total Salary
CEO _____	<u>183</u>	Yellow	\$9.00	X 2 = _____	
CFO _____	<u>184</u>	Red	\$8.50	X 2 = _____	
Administrative Asst. _____	<u>185</u>	Green	\$8.00	X 2 = _____	
CPA 1 _____	<u>186</u>	Green	\$8.00	X 2 = _____	
CPA 2 _____	<u>187</u>	Yellow	\$8.00	X 2 = _____	
Financial Advisor 1 _____	<u>188</u>	Yellow	\$8.00	X 2 = _____	
Financial Advisor 2 _____	<u>189</u>	Red	\$8.00	X 2 = _____	
Financial Advisor 3 _____	<u>190</u>	Green	\$8.00	X 2 = _____	
Insurance Agent 1 _____	<u>191</u>	Red	\$8.00	X 2 = _____	
Insurance Agent 2 _____	<u>192</u>	Green	\$8.00	X 2 = _____	

NOTE: IF using checkbooks, the above assigned account number MUST be the same account number written on the front of each citizen checkbook.

Section A: Total Salaries \$ _____

OPERATING COSTS

Boat	(\$6 to Boat Dealership)	\$6.00
Commercial Leasing	(\$4 to Realty Office)	\$4.00
Healthcare	(\$5 to Healthcare)	\$5.00
Philanthropy	(\$2 to Community Foundation)	\$2.00
Radio Advertising	(\$4 to City Hall)	\$4.00
Supplies	(\$7 to Supply Center)	\$7.00
	- First Supply Order \$5, Supply Reorders up to \$2	
Taxes	(\$5 to City Hall)	\$5.00
	- Personnel Taxes, Property Taxes	
Utilities	(\$5 to Utility Company)	\$5.00

Section B: Total Operating Costs \$ _____

TOTAL BUSINESS COSTS:
(Salaries plus Operating Costs)

\$
A + B

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Loan Application

BUSINESS INFORMATION

Business name: _____

Do you provide a good or a service? _____

*Use the information on the **Business Cost Sheet** to complete this application.*

EMPLOYEE INFORMATION

Number of employees: _____

Total of All Salaries: \$ _____ Line 1

Transfer from Business Cost Sheet: Section A

OPERATING COSTS INFORMATION

Total Operating Costs: \$ _____ Line 2

Transfer from Business Cost Sheet: Section B

TOTAL BUSINESS COSTS

Total Business Costs: \$ _____ Line 3
Line 1 + Line 2

TOTAL INTEREST AMOUNT
 (Multiply 5% times the **Total Business Costs**)

\$ _____ Line 4
Line 3 x .05

TOTAL AMOUNT DUE
 (Total Business Cost + Total Interest Amount)

\$ _____ Line 5
Line 3 + Line 4

As a representative of the above named business, I agree to repay the Total Amount Due, which includes both the loan amount requested plus interest. I certify that the above information is correct to the best of my knowledge.

 (CEO's Signature)

TO BE SIGNED BY BANK CEO AT JA BIZTOWN

Circle One: Approved Denied _____
(Bank CEO's Signature)

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Philanthropy Pledge

Good citizens are people who accept their share of responsibility for making their community a better place. Citizens can help by donating their time (volunteering), talent (skills), and treasure (money) to charitable organizations.

JA BizTown citizens have the opportunity to give back as individuals and as a business group to a worthy JA BizTown non-profit organization. On the day of the visit, the Community Foundation Development Director will collect this pledge sheet and invoice your business for \$2.00 in financial support.

PHILANTHROPY PLEDGE

(Business Name)

***My employees are aware of the mission of
non-profit organizations and their role in the community.
Our business pledges \$2.00 to support a non-profit organization.***

CEO's Signature: _____

Employees' Signatures: _____

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Professional Office BizPrep

Business Overview

Offers professional services by true professionals. This office park is comprised of small business owners ready to serve the public.

<p style="text-align: center;">CEO</p> <ol style="list-style-type: none"> 1. Submits loan application to bank. 2. Signs all business payroll checks. 3. Oversees business operations and makes business decisions. 4. Opens Utility Account. 5. Signs Insurance Policy and Lease Agreement. 6. Completes the Business Improvement Plan. 7. Prepares and gives speech at the Opening Town Meeting, if time permits. 	<p style="text-align: center;">CFO</p> <ol style="list-style-type: none"> 1. Places supply order. 2. Submits online request for business loan. 3. Inputs employee payroll information. 4. Processes business payroll. 5. Prepares direct deposit enrollment paperwork. 6. Completes Loan Promissory Note. 7. Makes business expense payments. 8. Makes business loan payments and tracks loan payoff progress.
<p style="text-align: center;">ADMINISTRATIVE ASSISTANT</p> <ol style="list-style-type: none"> 1. Greets clients and directs them to correct team member. 2. Distributes business supplies. 3. Processes incoming mail. 4. Sets up Point of Sale system. 5. Works with CEO to determine product prices. 6. Prepares sales area with product display. 7. Assists customers with sales and processes payments for sale of products. 8. Takes precautions to avoid inventory loss. 9. Works with CFO to reorder additional inventory, if needed. 	<p style="text-align: center;">CPA</p> <ol style="list-style-type: none"> 1. Prepares and sends Accounting invoices. 2. Discusses Inventory Loss Prevention with retail shops. 3. Audits business financial records. 4. Educates CFOs on loan payoff tracking. 5. Visits the Supply Center to verify inventory accuracy.
<p style="text-align: center;">FINANCIAL ADVISOR</p> <ol style="list-style-type: none"> 1. Researches financial investment process. 2. Markets to citizens the opportunity to invest money in a stock portfolio. 3. Greets customers and assists them in opening a stock portfolio. 4. Prepares and gives speech at the Closing Town Meeting, if time permits. 	<p style="text-align: center;">INSURANCE AGENT</p> <ol style="list-style-type: none"> 1. Completes Insurance Agent Licensing Exam. 2. Prepares and sends Insurance invoices. 3. Issues Insurance Policies to each <i>JA BizTown</i> business to cover property damage and liability. 4. Processes business insurance claim form and payment.