



RISE UP Initiative Application

SECTION 1: Business Information

Business name: _____

Principals:

Name: _____ Title: _____

Name: _____ Title: _____

Name: _____ Title: _____

Email address: _____

Business address: _____

Phone: _____ Year business started: _____

Describe principal's relevant experience prior to starting business:

Describe the nature of your business:

Has the business previously operated under a different name and/or ownership structure within the past three years? Yes ☐ No ☐

If yes, what was the previous business name: _____

Percentage of the business's work on: Public work: _____ Private work: _____

Percentage of the business's work on:

Commercial work: _____ Residential work: _____

Geographic area of operation: _____

Number of Employees:

Total Office: _____ Total Field: _____

Is your business signatory to any collective bargaining agreements? Yes ☐ No ☐

Is your business (Check all that apply) Minority Owned ☐ SDVOSB ☐
Woman Owned ☐

If yes, what percentage of ownership? _____

Is your business M/WBE or 8(a) Certified? Yes ☐ No ☐

If no, do you plan on applying for certification? Yes ☐ No ☐

SECTION 2: Legal Information

Has your firm or any of its principals petitioned for bankruptcy within the last seven years? Yes ☐ No ☐

If yes, have they been discharged (provide date of discharge)? _____

Is your firm or any of its principals currently involved in any civil litigation related to the business, or any criminal proceedings? Yes ☐ No ☐

If yes, please provide caption, venue and Index/Docket number of same.

Does the business or any of its principals have any outstanding liens or judgments? Yes ☐ No ☐

If yes, provide detail of same. _____

SECTION 3: Financial Information

Budgeted annual revenues this current fiscal year: _____

Banking Information:

Name of bank: _____

Contact name: _____

Do you have a Line Credit? ☐ Yes ☐ No If yes, please provide the following:

Commitment amount: _____

Current usage: _____

Renewal Date: _____

SECTION 4: Project Experience and References

Largest completed contracts (*three*):

1. Job Name: _____

City: _____ Date Completed: _____

Contract Price: _____

Contract Name: _____

Firm: _____

Phone: _____ Email: _____

Project Description:

2. Job Name: _____

City: _____ Date Completed: _____

Contract Price: _____

Contract Name: _____

Firm: _____

Phone: _____ Email: _____

Project Description:

3. Job Name: _____

City: _____ Date Completed: _____

Contract Price: _____

Contract Name: _____

Firm: _____

Phone: _____ Email: _____

Project Description:

References (Top Three Major Suppliers and Contractors):

1. Company Name: _____
Contact: _____
Phone Number: _____
2. Company Name: _____
Contact: _____
Phone Number: _____
3. Company Name: _____
Contact: _____
Phone Number: _____

SECTION 5: Business Plan: (Attach, should include answers to questions below)

1. Describe your management team and key employees.
2. List your support professionals (banker, insurance/bonding, attorney, CPA).
3. How do you plan on growing your business over the next five years?
4. What is your competitive advantage?
5. What are your strengths and weaknesses?
6. How would being in this program help your company?

SECTION 6: Supporting Documentation

Attach copies of:

Last three fiscal year-end financial statements or tax returns (If you have not been in business for three years, please include all returns and financial statements since inception.)

Most recent federal form 941

Owner and key staff resumes (optional)

Return by December 1, 2023 to:
Construction Exchange
2660 William St, Cheektowaga, NY 14227
or email jbenedict@conexbuff.com

Call the association office at (716) 874-3435 with questions.