Microenterprise Business Set Up Form

Municipality Name	Excelsior County			CDBG #	1234ME567-26
Business Name	David Rose LLC		dba	Rose Apothecary	
Business Owner	David Rose	%	Business Owner	Patrick Brewer	%
Business Owner	Alexis Rose	%	Business Owner		%
Business Address	1234 Tropical Cafe Rd, Creekside, NY 78901				
Start-Up or Existing Business?	Start-Up	Home-based business?	No	Seasonal business?	No
Previously Awarded CDBG funds?	No			Minority or Woman Owned business (MWBE)?	No
# of Employees Including Owner(s)	3	NAICS Code	44-45 Retail Trade	UEI #	12ABC34DEFG5
Business Award Date	9/15/26	Training Completion Date	09/01/26	Tier II Date Review (if applicable)	09/01/26

National Objective	LMJ	If LMCMC	• date 51% of ownership verified as LMI		• tax returns uploaded to Procorem ☐

If LMJ, indicate proposed job creation accomplishments below.		Average hours worked per week for any Part-Time jobs		20
Job Classification Title	Skills Required	# Full-Time Jobs to create	# Part-Time Jobs to create	LMI Status
Store Associate	No Experience/Education/Skills Required		2	LMI
	Select			Select
	Select			Select

Scope of Work

Rose Apothecary is a start up retail business offering a curated selection of locally sourced personal care products, home goods, specialty goods, gifts and artisan merchandise. Grant funds will be used for initial inventory purchases, display furniture, point of sale technology, and working capital (rent and utilities) to support early operations and cash flow. The investment will enable the business to establish operations, attract customers, create jobs, and contribute to the revitalization of the local commercial district.

How does the selection of this business and project scope of work align with the local program design?

Awarding Rose Apothecary supports the establishment and growth of an eligible start up microenterprise. The proposed scope of work addresses key start up needs allowing the business to establish operations and work toward long term sustainability. The proposed project supports the program's broader economic development goals by encouraging local entrepreneurship and expanding goods and services available within the community.

Use of Funds	Source of Funds			
	CDBG	Equity	Other	Subtotal
Inventory	5,000.00	3,500.00		8,500.00
Furniture & Equipment	10,000.00			10,000.00
Working Capital	20,000.00			20,000.00
Select				0.00
Direct Assistance to Business	35,000.00	3,500.00	0.00	38,500.00
Owner Equity %		10%		
Program Delivery				0.00
Total Amount of Funding	35,000.00	3,500.00	0.00	38,500.00

I certify that, to the best of my knowledge, this project summary is an accurate and truthful reporting of project details.

Recipient Name	Ronnie Lee	Title	Clerk
Recipient Signature		Date	09/15/26
Prepared By - Name	Twyla Sands, Consultant	Date	09/10/26