

Investment Project - Profile Form

The **Belize Investment Portfolio (BIP)** was launched to foster targeted matchmaking of pre-packaged investment concepts and projects. The campaign strives to support private sector investment projects seeking financing and / or investment partners by promoting and matchmaking qualified ‘shovel-ready’ business opportunities through various investment conferences, publications, and platforms regionally, inclusive of Connect Americas and the Caribbean Association of Investment Promotion Agencies (CAIPA), key supporters and collaborators of this initiative in Belize.

BelizeINVEST, BELTRAIDE can only promote investment projects that are legally permitted in accordance with the laws of Belize. Projects that are not legally permitted may not be considered for further promotion or matchmaking.

Disclaimer

Please note that BelizeINVEST, BELTRAIDE does not guarantee a successful match for any given investment project submitted to the Belize Investment Portfolio.

Please note that BelizeINVEST, BELTRAIDE, is in no way conferring any license or right(s) to the potential interest and that their investment project will be subjected to the Intellectual Property Laws of Belize, namely the Copyright Act Cap. 252, the Patents Act Cap. 253 and the Trademarks Act Cap. 257.

Each investment project submission is subject to further feasibility studies and due diligence to be completed by any potential interest in further validating the investment project advancing any applicable negotiations.

At the end of the application, you will be asked what information you prefer to share with potential interests as well as your preferred mode(s) of investment promotion to be executed by our team.

Part 1 Contact Information

First Name:	MI:	Last Name:
Gender:	Email Address:	
Position: <input type="checkbox"/> Owner <input type="checkbox"/> Partner <input type="checkbox"/> CEO <input type="checkbox"/> President <input type="checkbox"/> Employee <input type="checkbox"/> Representative <input type="checkbox"/> Other:		
Work Phone:	Mobile Phone:	
City/District:		
Professional Background:		

Part 2 Company Information

Company Name:	Date Established (MM/DD/YY):
Type of Company: <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation <input type="checkbox"/> LLC <input type="checkbox"/> Co-operative <input type="checkbox"/> Other (Specify):	Economic Sector: <input type="checkbox"/> Tourism & Leisure <input type="checkbox"/> Agribusiness & Agro-Processing <input type="checkbox"/> Offshore Outsourcing <input type="checkbox"/> Sustainable Energy <input type="checkbox"/> Fisheries & Mariculture <input type="checkbox"/> Logistics <input type="checkbox"/> Manufacturing <input type="checkbox"/> Healthcare <input type="checkbox"/> Other (Specify):
Address:	Website (if applicable):

Part 3 *Business / Project Validation

[illegible]

***(2) Description of Project Undertaking:** (minimum 200 words)

*Expand on the product(s) or service(s) offering.

*Highlight the machinery and equipment used to carry out the activity.

*Describe the various undertakings of the investment project and investment potential in Belize.

*Provide a status update of the project or any other projected investment / expansion plans.

***(3) Target Market and Marketing Channels:** (minimum 150 words)

* Identify the Target Market for the proposed project and provide additional details on the marketing plan.

* Identify potential marketing channels that can be used to reach your intended target market for the project.

***(4) Investment Plan:**

Capital Investment Secured to Date in USD: (for the project as described in section P3(2) above)

+

Capital Investment Required in USD: (for the project as described in section P3(2) above)

Total Estimated Capital Investment Size in USD: (for the project as described in section P3 (2) above)

*** Estimated Rate of Return on Investment (ROI)**

* Rate of Return on Investment (ROI) = Net Profit / Total Investment * 100

Sources of Financial Capital Currently Available

☐ Personal Savings and/or Funds (\$USD):

☐ Equity Capital (\$USD):

☐ Debt Financing (\$USD):

☐ Other (specify) (\$USD):

Preferred Sources of Financial Capital (Select at least one and quantify, if multiple selected, quantify each to total the capital investment required indicated in (4) above)

- ☐ Personal Savings and/or Funds (\$USD):
- ☐ Equity Capital (\$USD):
- ☐ Debt Financing (\$USD):
- ☐ Other (specify) (\$USD):

Preferred Sources of Financial Capital (Select all that apply)

- ☐ Joint Venture Partnership – entails an undertaking jointly by two or more parties that otherwise maintain distinct identities.
- ☐ Merger and Acquisition – involves having another entity either merge with or completely acquire an existing project in Belize.
- ☐ Sale of Venture – entails the selling of a company and its assets thereof to another entity completely.
- ☐ Concessionary Lease – comprises of a contract where one party conveys land, property, etc. to another for a specified time.
- ☐ Strategic Alliances – involves sharing of technical expertise, knowledge, or technology in exchange for a product or service.
- ☐ Other (specify):

***Supporting Justification / Project Feasibility:** (minimum 150 words)

- * Provide additional details to support the justification of the project in Belize inclusive of project feasibility
- * Why should someone invest in your project?
- * Convince the investor that the project is feasible

*** (5) Socio-Economic Benefits:**

Total Current Employment:

Total Estimated Employment:

- * Provide an estimated total number of employment to be generated by the project

*** Kindly describe other Socio-Economic Benefits of the Project:** (minimum 150 words)

* This section can include Corporate Social Responsibility (CSR), Knowledge / Technology Transfer, Training, Market Expansion / Diversification, Positive Direct / Indirect Impacts of the project and any other contributions to the community and society.

Part 4

Property Details

Project Site Specification:

District Location:

- ☐ Corozal
- ☐ Orange Walk
- ☐ Belize
- ☐ Stann Creek
- ☐ Cayo
- ☐ Toledo

Property Type

- ☐ Industrial
☐ Commercial
☐ Agricultural
☐ Combination of the above
specify):
☐ Other (specify):

*** Property Size:**

Indicate property size in Acres.

*** Type of legal access to the property:**

- ☐ Proof of Ownership
☐ Lease Agreement
☐ Other (specify):

***Description of Property:** (minimum 50 words)

- * What differentiates this site?
- * Elaborate on the strategic advantages offered by the location (commercial appeal/special features of the area)

*** Does the Property have any existing infrastructure (access to utilities and / or road infrastructure)?**

Please check all that apply.

- ☐ Access to source of energy (Electricity from national grid, solar, hydro or other sources)
- ☐ Access to Telecommunication Network
- ☐ Access to Potable Water
- ☐ All weather road
- ☐ Highway access
- ☐ Other (specify):

Does your property have any existing buildings? Yes No

If Yes, kindly complete the table below: (at least one square footage is required)

	Sq Ft.
E.g. Warehouse, Storage Room, Existing Condo	
E.g. Warehouse, Storage Room = Existing Condo	
E.g. Warehouse, Storage Room, Existing Condo	
E.g. Warehouse, Storage Room, = Existing Condo	
E.g. Warehouse, Storage Room, Existing Condo	

Total Area

Kindly indicate which of the following documents are currently available:

Environmental Clearance from Department of Environment

- ☐ Central or Local Building Authority Clearance
- ☐ Letter of Support from Government or associated entities
- ☐ Memorandum of Understanding with GOB or associated entities
- ☐ Letter of Intent (LOI) from current prospective clients
- ☐ Letter of Intent (LOI) from prospective financiers
- ☐ Financial Plan / Capitalization Model
- ☐ Feasibility Study
- ☐ Other (specify):

*** If Operational, do you have any certifications in place? Kindly specify** E.g. HACCP, Aquaculture Stewardship, ISO, GMP, BPO Standards.

*** Have you previously held or currently have an investment incentive via BELTRAIDE?**

Yes No

If yes, kindly indicate which incentive.

- ☐ Designated Processing Area (DPA)
- ☐ Fiscal Incentives Program (FI)

(Required Documents to be submitted)

1. Land Tenure Documentation inclusive but not limited to:
 - Land Register Report for the property owner.
 - Lease Agreement (if the property is not in the company name)
2. Company Documents
 - Certificate of Incorporation
 - Detailed long extract for the company.
3. Supporting documents available:
 - DOE Clearance
 - CBA Clearance
 - MOU
 - Letter of Intent
 - Financial Plan
 - Feasibility Study
4. Google map location
5. Certification certificate (if applicable)
6. Pictures of property and structures (High resolution images)

Authorization

By completing and submitting this investment project to BelizeINVEST, BELTRAIDE, the applicant hereby grants BelizeINVEST, BELTRAIDE permission and authorization to promote and share the cited investment project in its investment promotion and matchmaking endeavors. Kindly select your preferred mode of information sharing: **(select only one)**

- ☐ Investment Project Pitch in its entirety with potential interests (excluding annexes or documents uploaded)
- ☐ Investment Project Pitch in its entirety with potential interests (including any annexes or documents uploaded)

Kindly select your preferred mode(s) of promoting the investment project to potential interests through BelizeINVEST, BELTRAIDE and our regional partners: **(select all that apply)**

- ☐ Via BELTRAIDE's online marketing channels including blogs and social media and website www.beltraide.bz
- ☐ Via investment inquiries received by BelizeINVEST, BELTRAIDE
- ☐ Via the Caribbean Association of Investment Promotion Agencies (CAIPA) matchmaking events and online at www.carib-export.com
- ☐ Via international / regional trade and investment conferences held globally
- ☐ All the above

Thank you for your submission of an investment project to the Belize Investment Portfolio (BIP). Our team at BelizeINVEST, BELTRAIDE will be contacting you within five (5) working days to verify source and completeness of the submission. As part of the validation process, our team will be conducting a site visit.

Kindly email the completed form and compile the annexes to investment@beltraide.bz