

Dear Prospective Business Partner,

Thank you for your interest in Wheeler, Texas! On behalf of the Wheeler Economic Development Corporation and our Board of Directors, we are thrilled you are considering an investment in this community. Whether you are an established local entity who desires to expand, a new organization seeking possible relocation, or an entrepreneur with a business idea, we are here to assist you with every step. Industry diversification and overall economic growth are both critical to our local economy. Moreover, we are also committed to ventures that will improve quality of life for our citizens and offer them a variety of entertainment options.

To this end, we offer incentive packages that are custom tailored to meet your needs. All incentive offers are evaluated on their own merits and are subject to approval by the Wheeler EDC Board of Directors and the Wheeler City Council. Approval is contingent upon the feasibility of the project, capital investment, job creation and overall benefit to the community. We accept proposals throughout the year.

Please read the information and forms contained within this packet carefully. All information must be filled out accurately and completely. We respect your privacy as a business; therefore, information submitted will remain confidential. As good stewards of public funds, we will check certain information to ensure complete validity.

If you have any questions please call or come by.

Sincerely,

Kristen Moudy  
Executive Director  
Wheeler Economic Development Corporation  
PO BOX 98  
Wheeler, TX 79096  
806.826.3408



# Wheeler Economic Development Corporation Small Business Incentive Program Application

Name of Business: \_\_\_\_\_

Tax Identification #: \_\_\_\_\_

Business's Primary NAICS # or describe business type: \_\_\_\_\_

(manufacturing, business services, etc.)

Organization Type (circle one):    Sole Proprietor       Partnership       Corporation or LLC

How long in business: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Physical Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Email: \_\_\_\_\_ Fax: \_\_\_\_\_

Primary Project Contact Name and Title: \_\_\_\_\_

Primary Project Phone: \_\_\_\_\_

Current Number of Full-Time Employees: \_\_\_\_\_ Part-Time: \_\_\_\_\_

Projected Number of Full-Time: \_\_\_\_\_ Part-Time: \_\_\_\_\_

Please attach summary of most recent TWC quarterly filing.

Will the firm be locating within the Wheeler city limits?    YES    or    NO

Does this business generate taxable sales:                    YES    or    NO

Please identify the type of project(s) for which you are applying for assistance (all that apply):

- \_\_\_\_\_ Façade Improvements
- \_\_\_\_\_ Structural Upgrades
- \_\_\_\_\_ Interior Improvements or expansion
- \_\_\_\_\_ Technology Assistance
- \_\_\_\_\_ Lease subsidy or relocating
- \_\_\_\_\_ Marketing campaign or promotion
- \_\_\_\_\_ Other (please specify):

Anticipated project start: \_\_\_\_\_

Anticipated project completion: \_\_\_\_\_

Source(s) of matching funds: \_\_\_\_\_

Please describe the firm's primary reason to start, expand or relocate to the North Wheeler Area:

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Please write a short description of the project(s) you plan to complete with the assistance of the WEDC Small Business Incentive Program:

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Please describe your reason for undertaking this/these specific project(s) and how this/these project(s) will help your business expand; such as services offered, impact to business revenue, employment opportunities, or any other outcomes you expect from the project(s) you plan to complete:

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Please list the firm's market value for new or additional property purchased or constructed each year that will be on the local tax rolls on January 1<sup>st</sup>

	Year 1	Year 2	Year 3
Land			
Buildings & Other Real Property			
Furniture, Fixtures & Equipment			

Are building & improvement costs for new construction?    YES    or    NO

Percent of construction costs for materials and labor: \_\_\_\_\_

Materials: \_\_\_\_\_

Labor: \_\_\_\_\_

Estimated taxable inventories, at the end of each year:

Year 1: \_\_\_\_\_

Year 2: \_\_\_\_\_

Year 3: \_\_\_\_\_

Job Category	Current # of Employees in Wheeler (Existing)	Annual Salary of Current Employees	Annual Salary of New Employees	Estimated Employment Growth fo Proposed Project Number of Employees to be Added Each Year					Total Additions
				Year 1	Year 2	Year 3	Year 4	Year 5	
Executive									
Mid-Level									
Entry									
TOTAL									

Estimated Total Project Cost: \$ \_\_\_\_\_

If applicable, please attach at least two (2) bids per project to support estimated cost.

Are you current on all local sales tax and property tax accounts? (please attach proof if "YES")

YES or NO

Is the property currently insured? (Please attach proof if "YES") YES or NO

Name of Owner(s); Partners; Members; Principals; Directors: \_\_\_\_\_

List any DBA's or assumed names (personally and business): \_\_\_\_\_

*I certify that the information contained herein is true and correct.*

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Title

This application should be completed and returned with the required documentation before any incentive considerations can be given. The Wheeler Economic Development Corporation shall require such financial and other information as may be deemed appropriate for evaluating the financial capacity and other factors of the applicant/applicants. An electronic copy of this application is available at [www.wheelertexas.org](http://www.wheelertexas.org).

**Please submit the completed request to:**

Wheeler Economic Development Corporation  
 C/O Wheeler Economic Development Director  
 505 S. Alan L. Bean Blvd.  
 Wheeler, TX 79096  
 Email: [edc@wheelertexas.org](mailto:edc@wheelertexas.org)  
 Phone: 806.826.3408

**Attachments Included:**

Small Business Incentive Program Checklist  
 Authorization Form for Consumer Reports  
 Reference Sheet  
 Property Owner Authorization

**\*\*Internal Date and Time Received\*\***

**Date:** \_\_\_\_\_

**Time:** \_\_\_\_\_

**Staff Signature:** \_\_\_\_\_

# **Wheeler Economic Development Corporation Small Business Incentive Program Checklist**

Please complete the following list of forms for further consideration. If you do not have the form or if you have questions about any of the content, please contact the EDC Director at 806.826.3408 or [edc@wheelertexas.org](mailto:edc@wheelertexas.org).

\_\_\_\_\_ **Small Business Incentive Program Application**

\_\_\_\_\_ **Authorization Form for Consumer Reports (Form Enclosed)**

- We require the customer to undergo a background and criminal/civil history check
- Wheeler Economic Development Corporation will obtain a credit report.

\_\_\_\_\_ **Personal/Business Financial Statements for the Last Two (2) Years**

\_\_\_\_\_ **Prior Two (2) Years Tax Returns Showing Business Income**

\_\_\_\_\_ **Current Employee Count (Attach Summary of Most Recent TWC Filing)**

\_\_\_\_\_ **Reference Sheet**

- On the form enclosed, please provide us with two (2) personal, two (2) business, and two (2) banking references.

\_\_\_\_\_ **Proof of Ownership or Property Owner Authorization**

- Documentation showing you either lease or own the current facility where your business is located.
- If you are in a leasing agreement, permission from the owner will be required, prior to execution of any loan or incentive agreements

\_\_\_\_\_ **Plans and Drawings**

- For renovation or expansion of facility, please include plans, drawings and/or detailed description

\_\_\_\_\_ **Cost Estimates**

- An itemized cost analysis including materials, permits, rented equipment and related costs. If applicable, please include a minimum of two (2) contractor bids

\_\_\_\_\_ **Meet with Leading EDG, LLC. date and time met: \_\_\_\_\_**

- Wheeler Economic Development Corporation requires the recipient to meet with Matty McLain of Leading EDG, LLC to assist and review the following:
  - Current Business and Marketing Plan
  - Financial Statement Review (Balance Sheet and Profit and Loss - Annual YTD)
  - Copy of last two (2) years of personal and/or corporate tax returns
  - Three years (3) pro-formas as result of project completion (can work with Matty to complete)

**Wheeler Economic Development Corporation  
Authorization Form for Consumer Reports**

Applicant's Name: \_\_\_\_\_

Personal Address: \_\_\_\_\_

City / State / Zip: \_\_\_\_\_

Business Address: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Driver's License # / State: \_\_\_\_\_

Tax ID#: \_\_\_\_\_

DBA(s): \_\_\_\_\_

Other / Former Names: \_\_\_\_\_

In connection with the application for incentives and/or loans with the Wheeler Economic Development Corporation, I understand that an agent or employee of the Wheeler Economic Development Corporation may obtain a consumer report about me, which may contain driving records, court records, criminal records, academic records, professional license records, employment history and credit reports. An authorized person may also interview past employers, employees, or other personal or professional contacts to obtain information about my professional conduct, character, general reputation, personal characteristics, and job performance. Further, I understand that information from various Federal, State, local and other agencies which contain my past activities may be requested.

I understand that I may submit a written request within a reasonable period of time to receive information obtained about me in a consumer or investigative report conducted or obtained by the Wheeler Economic Development Corporation. I will be required to show proper identification and pay any legally permissible fees prior to having those reports released to me.

I hereby authorize and request, without any reservation, any present or former employer, school, police department, financial institution, division of motor vehicles, consumer reporting agencies, or other persons or agencies having knowledge about me to furnish the Wheeler Economic Development Corporation with any/all background information in their possession regarding me, in order that my application may be evaluated.

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

# Wheeler Economic Development Corporation Reference Sheet

## Personal References:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

## Business References:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

## Banking References:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

