



Financial Performance * Social Impact * Environmental Sustainability

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Top 10 List for Social Enterprises to work with Banks

10. Ensure you are a legal, registered entity
9. Have up-to-date historical financial statements
8. Know your banker by his/her first name
7. Know what you are asking for
6. Make sure your banker does what you are asking for
5. Build relationship and financial record slowly and steadily
4. Avail yourself to ALL available financial products and services
3. Consider bankers for numerous needs: business, philanthropy, advisory board
2. Monitor cash flow: especially for getting paid and paying bills
1. Ask. If you don't know, ask. Make requests in way banker can understand

SOCIAL ENTERPRISE ASSOCIATES is a consulting firm providing business oriented 'triple bottom line' results – generating financial, social, and environmental returns. We enable for- and non-profit entrepreneurs, in the U.S. and around the world, to put ideas into action. More information and our publications can be found online at www.socialenterprise.net.

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