

# Executive Summary

## Capital Investment Proposal

### 1. Project Overview

Brief description of the proposed investment, its objectives, and how it aligns with the company's strategic goals.

**Example:** This proposal seeks approval for a \$2M investment in expanding manufacturing capacity at Plant X to meet increasing demand in the North American market.

### 2. Key Benefits & Strategic Rationale

- Increase annual production capacity by 25%
- Reduce unit costs by leveraging economies of scale
- Support product innovation and faster time-to-market
- Capitalize on growing market demand

### 3. Financial Summary

**Total Capital Required:** \$2,000,000

**Estimated Return on Investment (ROI):** 22% over 5 years

**Payback Period:** 3.2 years

**Key Assumptions:** Market growth 8%/year, stable raw material costs

### 4. Risk Assessment & Mitigation

- **Market risk:** Mitigated by established purchase agreements
- **Operational risk:** Experienced project management team in place
- **Regulatory risk:** All necessary permits secured

### 5. Implementation Timeline

- **Q3 2024:** Finalize procurement and contracting
- **Q4 2024:** Begin facility expansion
- **Q2 2025:** Complete installation and begin operations

### 6. Recommendation

This investment is recommended for approval as it supports strategic growth, offers a strong financial return, and manageable risk profile.

### Important Notes

- Keep the executive summary concise—ideally one page.
- Focus on the most compelling benefits and business rationale.
- Avoid technical jargon and provide actionable, high-level information.
- Ensure financial data and risk assessments are accurate and justified.
- Summarize recommendation and next steps clearly for decision-makers.

