

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.

