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|  | CANDIDATE RESEARCH FORM |

# Franchise Applicant

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| First: Click here to enter text. | M.I.: Click here to enter text. | Last: Click here to enter text. | DOB: Click here to enter text. |

Spouse of Franchise Applicant

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| First: Click here to enter text. | M.I.: Click here to enter text. | Last: Click here to enter text. | DOB: Click here to enter text. |

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| 1 | Initial Qualifying |
| **1.01** | Are you interested in just one industry or several?  Click here to enter text. |
| **1.02** | What franchises are you interested in?  Click here to enter text. |
| **1.03** | It is an interesting time to be looking at business ownership; what is motivating your search?  Click here to enter text. |
| **1.04** | Would you mind sharing what line of work you’re in now? Do you enjoy it?  Click here to enter text. |
| **1.05** | Have you ever owned a business before? If so, what industry and did you sell this business?  Click here to enter text. |
| **1.06** | I have worked in several industries. Has your career been diverse? Would you mind sharing?  Click here to enter text. |
| **1.07** | Are you planning to enter business ownership alone or will you have partners? How does your family feel about your decision?  Click here to enter text. |

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| 1 | Initial Qualifying |
| **1.08** | Most people enter business ownership to make more money, improve their quality of life, are passionate about an industry, and want more control over business decisions that affect them. Would you agree? In what order of priority would you say best describes you?  Click here to enter text. |
| **1.09** | If I asked you how much you wanted to make you would probably tell me over six figures. So let me ask the questions this way, how much do you need to make to cover your household expenses? The reason this is important is because all business needs time to ramp-up and generate cash flow. I want to make sure we find a business that meets your expectations in that regard.  Click here to enter text. |
| **1.10** | Are you familiar with the concept of franchising? If so which ones are you familiar with and of interest?  Click here to enter text. |
| **1.11** | Are you ready to be in business for yourself or is there some trepidation we should discuss? If you are ready what is your timeframe if you were 100% sure of what you wanted.  Click here to enter text. |

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| 2 | Funding & Financials |
| **2.01** | How do you plan to fund the business? Are you planning on borrowing funds? Do you have retirement plans you intend to use?  Click here to enter text. |
| **2.02** | Do you have a need for SBA Funding?  Click here to enter text. |
| **2.03** | Do you prefer the franchise offer in-house funding?  Click here to enter text. |
| **2.03** | Do you happen to know what your credit score currently is? Is this an estimate?  Click here to enter text. |
| **2.04** | Have you served in the military or qualify for a VA loan?  Click here to enter text. |
| **2.05** | Do you feel you would qualify for a minority grant?  Click here to enter text. |

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| 2 | Funding & Financials |
| **2.06** | How much money are you comfortable with investing in an opportunity? How much of this is liquid?  Click here to enter text. |
| **2.07** | What is your current net worth, including your retirement funds?  Click here to enter text. |
| **2.08** | Have you or your spouse ever been convicted of something other than a minor traffic violation? If yes, please explain and include the date, location, charge, and disposition of the charge.  Click here to enter text. |
| **2.09** | Are you or your spouse subject to a pending litigation or unsatisfied judgments? If yes, please explain.  Click here to enter text. |
| **2.10** | Have you or your spouse ever declared bankruptcy? If yes, please explain with bankruptcy filing date.  Click here to enter text. |

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| **Assets** | | **Liabilities** | | **Income** | | **Expenses** | |
| Checking Account | Click here to enter text. | Notes Payable | Click here to enter text. | Salary | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Savings Account | Click here to enter text. | Home Mortgage | Click here to enter text. | Bonuses or  Commission | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Stocks/Bonds/  Securities | Click here to enter text. | Other Real Estate | Click here to enter text. | Dividends and  Interest | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Retirement Plan/  IRA/401K | Click here to enter text. | Auto Loan | Click here to enter text. | Real Estate  Income | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Home (Market Value) | Click here to enter text. | Credit Cards | Click here to enter text. | Other (Itemize) | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Other Real Estate | Click here to enter text. | Charge Accounts | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Autos (Market Value) | Click here to enter text. | Taxes Payable | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Life Insurance (Cash  Value) | Click here to enter text. | Other Liabilities | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Your Own Business | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Money Due to You | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Other Assets (Itemize) | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Total Assets (Itemize) | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| **TOTAL ASSETS** | Click here to enter text. | **TOTAL LIABILITIES** | Click here to enter text. | **TOTAL INCOME** | Click here to enter text. | **TOTAL EXPENSES** | Click here to enter text. |
| **Total Assets Minus Total Liabilities Equal Net Worth** | | | | Click here to enter text. | | Click here to enter text. | |
| **Difference Between Income and Expenses** | | | | Click here to enter text. | | Click here to enter text. | |
| **Amount of Cash Available for Franchise** | | | | Click here to enter text. | | Click here to enter text. | |

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| 3 | Additional Candidate Research |
| **3.01** | Do you have any marketing experience?  Click here to enter text. |
| **3.02** | Do you have any management experience?  Click here to enter text. |
| **3.03** | Do you have sales experience?  Click here to enter text. |
| **3.04** | Do you have customer service and account management experience?  Click here to enter text. |
| **3.05** | What aspects of business ownership are most attractive to you?  Click here to enter text. |
| **3.06** | Is there any aspect of this or any business that you prefer not to handle?  Click here to enter text. |
| **3.07** | What are your expectations for the Franchise – what type of lifestyle are you looking to achieve?  Click here to enter text. |
| **3.08** | Are you interested in the possibility of purchasing additional units now or in the future for this franchise?  Click here to enter text. |
| **3.09** | If you could create the perfect business for yourself, what characteristics would this business have?  Click here to enter text. |
| **3.10** | What type of employee’s (if any) would you prefer to work with?  Click here to enter text. |
| **3.11** | Will your family participate in this business?  Click here to enter text. |
| **3.12** | What do you enjoy most in your daily business activities?  Click here to enter text. |
| **3.13** | What do you like to do in your free time? What are your hobbies and interests?  Click here to enter text. |
| **3.14** | Do you consider yourself more of an intro or extrovert?  Click here to enter text. |
| **3.15** | Are you comfortable in attending networking functions and promoting your new business?  Click here to enter text. |
| **3.16** | Do you have experience in reviewing financial statements?  Click here to enter text. |

Fact Finding and the My Franchise Partners System

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| 4.1 | Category | | |
| **4.1.01** | Are you interested in franchises or business opportunities or both?  Click here to enter text. | | |
| **4.1.02** | What industries are you most interested in? Select all that apply: | | |
| Advertising | | Green Company | Retail |
| Automotive | | Health - Medical | Repair & Restoration |
| Beauty | | Health - Nutrition | Senior Care |
| Building, Storage, Decorating | | Home Improvement | Signs |
| Business Services | | Lodging | Sports & Recreation |
| Child Education & Development | | Maid Service & Cleaning | Staffing |
| Computer Technology | | Maintenance, Restoration & Cleaning | Tanning |
| Distribution Services | | Management & Training | Unique |
| Dry Cleaning, Laundry | | Packing & Mailing | Professional Services |
| Event Planning | | Pet Care & Animal Services | Fitness |
| Financial Services | | Print, Copy & Mail | Other |
| Food & Beverage | | Real Estate & Investing | N/A |

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| 4.2 | Company Details | |
| **4.2.01** | Do you require that the company provides a formal coaching program? | Yes |  No |
| **4.2.02** | Do you prefer to have minimal competition or do you prefer a strong brand name? | Yes |  No |
| **4.2.03** | Do you prefer B2B or B2C? | B2B |  B2C |
| **4.2.04** | Do you prefer a retail location or home-based business model? | Retail |  Home |
| **4.2.05** | Would you prefer to have an inventory or service-based business model? | Inventory  Service |
| **4.2.06** | Would you like to have a staff? If so, which size of staff are you comfortable with? Small (0-6 employees) medium (6-20 employees) or large (>21 employees)? | 0-6  6-20  21+ |
| **4.2.07** | Do you prefer part-time of full-time employees? | Full Time  Part Time |
| **4.2.08** | Are you comfortable with a business that requires cold calling? | Yes |  No |
| **4.2.09** | Is a repeat client base important to you? | Yes |  No |
| **4.2.10** | Are you going to be in this business as an owner/operator or do you prefer a passive model, semi-passive model? | Owner / Operator  Passive |  Semi |
| **4.2.11** | Is working standard business hours (9am-5pm) important to you? | Yes |  No |

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| 4.3 | Brand Strength | | |
| **4.3.01** | Is the number of years the concept has been in business important to you? | Yes |  No |  |
| **4.3.02** | Is the number of current Franchisee’s/licensee’s important to you? | Yes |  No |  |
| **4.3.03** | If looking for SBA Funding, do you prefer a brand that is fast-tracked for SBA funding? | Yes |  No |  |
| **4.3.04** | Is a brand that has less than a 20% loan default rate with the SBA important to you? | Yes |  No |  |
| **4.3.05** | Would you like to know what other franchisee’s in the system are making? | Yes |  No |  |
| **4.3.06** | Do you prefer the franchisor/licensor offer national accounts? | Yes |  No |  |
| **4.3.07** | Does the company have to be within the top 500 of Entrepreneur’s magazine list? | Yes |  No |  |
| **4.3.08** | Is having a “World Class Franchise” important to you? | Yes |  No |  |

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| 4.4 | Territories | | |
| **4.4.01** | Where are you looking to open your business?  Click here to enter text. | | |
| **4.4.02** | Is the focus region of where the company plans to develop important to you? | Yes |  No |  |
| **4.4.03** | Are you interested in masters? | Yes |  No |  |
| **4.4.04** | Does the company have to provide a specific and guaranteed territory? | Yes |  No |  |

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| 4.5 | Immigration | |
| **4.5.01** | Is this a candidate that will be requiring a visa? If so, E-2 or EB-5? | E-2 |  EB-5 |

Notes:

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Click here to enter text.