

Candidate Research Form

Franchise Applicant

First	M.I.	Last		DOB
Address	City	FL	Zip Code	Phone Number

Spouse of Franchise Applicant

First	M.I.	Last	DOB
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1	Initial Qualifying
1.01	Is this your first inquiry? Have you looked at any other franchises?
1.02	Did something happen that caused you to be motivated to look for a new opportunity?
1.03	What type of capital are you considering investing into the franchise? How are you sourcing the capital? Do you need funding? Do you know what your credit score is currently?
1.04	Have you ever owned a business before? If so, what industry and did you sell this business?
1.05	What Business are you in now?
1.06	Are you planning to enter business ownership alone or will you have partners? How does your family feel about your decision?

1 Initial Qualifying	
1.07	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.
1.08	Are you familiar with the concept of franchising? If so which ones are you familiar with and of interest?

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?
2.02	Do you have a need for SBA Funding?
2.03	Do you happen to know what your credit score currently is? Is this an estimate?
2.04	Have you served in the military or qualify for a VA loan?

2 Funding & Financials	
2.06	How much money are you comfortable with investing in an opportunity? How much of this is liquid?
2.07	What is your current net worth, including your retirement funds?
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.
2.09	Are you or your spouse subject to a pending litigation or unsatisfied judgments? If yes, please explain.
2.10	Have you or your spouse ever declared bankruptcy? If yes, please explain with bankruptcy filing date.

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

3 Additional Candidate Research	
3.01	Do you have any marketing experience?
3.02	Do you have any management experience?
3.03	Do you have sales experience?
3.04	Do you have customer service and account management experience?
3.05	What aspects of business ownership are most attractive to you?
3.06	Is there any aspect of this or any business that you prefer not to handle?
3.07	What are your expectations for the Franchise – what type of lifestyle are you looking to achieve?
3.08	Are you interested in the possibility of purchasing additional units now or in the future for this franchise?
3.09	What type of employee's (if any) would you prefer to work with?
3.10	Will your family participate in this business?
3.11	What do you enjoy most in your daily business activities?
3.12	Tell me about the community and area where you want your franchise
3.13	Are you comfortable in attending networking functions and promoting your new business?
3.14	Do you have experience in reviewing financial statements?

Fact Finding and the FLS (FranLink System)

Please visit the FBA Member's domain at www.fbamembers.com and click on "FranLink System" to enter the information into the system. This will populate franchises that match the criteria entered into the system.

4.1 Category		
4.1.01	What industries are you most interested in? Rate 1-10 for each	
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

4.2 Company Details		
4.2.01	Do you prefer B2B or B2C?	B2B B2C
4.2.02	Do you prefer a retail location or home-based business model?	Retail Home
4.2.03	Would you prefer to have an inventory or service-based business model?	Inventory Service
4.2.04	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+
4.2.05		Full Time Part-Time
4.2.06	Are you comfortable with a business that requires cold calling?	Yes No
4.2.07	Is a repeat client base important to you?	Yes No
4.2.08	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
4.2.09	Is working standard business hours (9am-5pm) important to you?	Yes No

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	Would you like to know what other franchisee's in the system are making?	Yes No

4.4	Territories	
4.4.01	Where are you looking to open your business?	
4.4.02	Are you interested in masters?	Yes No

4.5	Immigration	
4.5.01	Is this a candidate that will be requiring a visa? If so, E-2, L1 or EB-5?	E-2 EB-5