

## **FRANCHISE QUALIFICATION REPORT**

### **PERSONAL INFORMATION**

### **SFS LEAD FORM**

**Date:** \_\_\_\_\_

**Name:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Address:** \_\_\_\_\_ **City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Day Phone:** \_\_\_\_\_ **Evening Phone:** \_\_\_\_\_

**Marital Status:** \_\_\_\_\_ **Number of Children:** \_\_\_\_\_ **Total Number of dependents:** \_\_\_\_\_

**Spouses Name:** \_\_\_\_\_ **Spouses Occupation:** \_\_\_\_\_

### **EDUCATION**

**High School:** \_\_\_\_\_ **Graduated ( date):** \_\_\_\_\_

**College:** \_\_\_\_\_ **Graduated:** \_\_\_\_\_ **Degree:** \_\_\_\_\_

**Other:** \_\_\_\_\_ **Graduated:** \_\_\_\_\_ **Degree:** \_\_\_\_\_

**Special Training:** \_\_\_\_\_

**Military Experience/Branch/Rank:** \_\_\_\_\_

### **BUSINESS EXPERIENCE**

**Present or Last Occupation:** \_\_\_\_\_

**Name of Company:** \_\_\_\_\_ **Date Started:** \_\_\_\_\_

**Address:** \_\_\_\_\_ **City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Title & Function:** \_\_\_\_\_

\_\_\_\_\_

**Previous Employment, Title, Function & Starting Dates:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Do you have a financial partner, or any other personal source of investment capital? Yes:** \_\_\_\_\_ **No:** \_\_\_\_\_

**If Yes, please explain:** \_\_\_\_\_

\_\_\_\_\_

**How did you hear about this Business Brokerage?** \_\_\_\_\_

**FINANCIAL INFORMATION:**

<b>Assets</b>	<b>\$</b>	<b>Liabilities</b>	<b>\$</b>
Cash on Hand & in Banks	_____	Notes Payable to Banks	_____
Real Estate	_____	Real Estate & Mortgages	_____
Stocks & Bonds	_____	Misc. Accounts Due	_____
Miscellaneous	_____	Child Support	_____
	_____	Total Liabilities	_____
Total Assets	_____	Net Worth	_____
		( Total assets less total liabilities)	

Monthly Household Living Expenses \_\_\_\_\_

<b>Additional Annual Income</b>	<b>Self</b>	<b>Spouse</b>
Source of Continuous Income	_____	_____
Other	_____	_____
Total	_____	_____

Do You Have Any Judgments, Liens or Suits Pending? \_\_\_\_\_

Do You Have a Source for Financing? Yes \_\_\_\_ No \_\_\_\_ If So, Who? \_\_\_\_\_

Have You Been convicted of a Felony? \_\_\_\_\_

Where is Your Choice of Markets? 1<sup>st</sup>: \_\_\_\_\_ 2<sup>nd</sup>: \_\_\_\_\_  
3<sup>rd</sup>: \_\_\_\_\_

If Qualified, When Would You be Ready to Invest in Your Franchise? \_\_\_\_\_

Do You Want To Supplement or Replace Your Current Income? \_\_\_\_\_

How Much of Your Personal Savings Are You Willing to Invest? \_\_\_\_\_

Will You Devote Full-Time? If Not Who Will Manage? \_\_\_\_\_

Interested in Multiple or Single Location? \_\_\_\_\_

How Long Have You Been Seriously Looking for a Business? \_\_\_\_\_

What Kind of Businesses Have You Looked At? \_\_\_\_\_

What Franchises Have You Talked Too? \_\_\_\_\_

What is Motivating You to Buy a Business? \_\_\_\_\_

NOTES: \_\_\_\_\_

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