

## Client Information

Date:	Name:
Home Number:	Business Number:
Cell Number:	Fax Number:
E-Mail:	
Address:	
City, State, Zip Code:	

## Personal Information

Date of Birth:	Marital Status:
Spouse's Name:	Spouse's Occupation:
General Health:	Total Dependents:
Are you a U.S. Citizen?	If not, what country?
Home: Own or Rent/How long?	
Former Residence:	
What Source Prompted your Inquiry?	
Who referred you to us?	

## Professional Experience

1. Company:	Address:	
Division:	Employed from:	to:
Describe responsibilities:		
2. Company:	Address:	
Division:	Employed from:	to:
Describe responsibilities:		
3. Company:	Address:	
Division:	Employed from:	to:
Describe responsibilities:		

## Education

Last year of High School completed: (1, 2, 3 or 4)	
Last year of College completed: (1, 2, 3, 4 or 5)	
Last year of Post-Graduate completed: (1, 2, 3 or 4)	
School/University Name:	Year Graduated:
Degree:	Special Certification:

## General

Would you plan to spend full time in this business?	
If not, please explain your other obligations:	
Have you ever failed in business or compromised with creditors?	
If yes, please explain:	

# Personal Financial Statement

Please answer all questions, using "no" or "none" where necessary.

<b>Assets</b>	<b>Current</b>
Cash on Hand and Unrestricted in Banks.....	\$
U.S. Government Securities.....	\$
Notes Receivable.....	\$
Life Insurance, <b>Cash Surrender Value</b> - NOT death benefit..... amount (do not deduct loans)	\$
Other Stocks and Bonds.....	\$
Real Estate.....	\$
Automobiles Registered in Own Name.....	\$
Other Assets (itemize)	\$
<b>Total Assets.....</b>	<b>\$</b>

<b>Liabilities &amp; Net Worth</b>	<b>Current</b>
Notes Payable to Banks.....	\$
Notes Payable to Others.....	\$
Loans Against Life Insurance.....	\$
Accounts Payable.....	\$
Interest Payable.....	\$
Taxes and Assessments Payable.....	\$
Mortgages Payable on Real Estate.....	\$
Brokers Margin Accounts.....	\$
Other Liabilities (itemize)	\$
<b>Total Liabilities.....</b>	<b>\$</b>
<b>Total Assets - Total Liabilities = Net Worth.....</b>	<b>\$</b>

<b>Source of Income</b>	<b>Current</b>
Salary (annualized).....	\$
Bonus and Commissions.....	\$
Dividends and Interest.....	\$
Real Estate Income.....	\$
Other Liabilities (itemize)	\$
<b>Total Income.....</b>	<b>\$</b>
<b>Available Capital to Invest in this Franchise.....</b>	<b>\$</b>

## Location Preferences

First choice:	City	State
Second Choice:	City	State
Third Choice:	City	State
Would you be willing to relocate?		

## References

<b>Business References</b>		
1. Company		Phone
Contact	Address	
2. Company		Phone
Contact	Address	

<b>Personal References</b>		
1. Name		Phone
Address		
2. Name		Phone
Address		

<b>Bank References</b>		
Bank Name		
Contact		Phone

Place an 'X' next to the traits below that apply to you:

<input type="checkbox"/> Likes positions of authority	<input type="checkbox"/> Enthusiastic
<input type="checkbox"/> Takes charge	<input type="checkbox"/> Adventurous
<input type="checkbox"/> Determined	<input type="checkbox"/> Motivator
<input type="checkbox"/> Confident	<input type="checkbox"/> Energetic
<input type="checkbox"/> Firm	<input type="checkbox"/> Very verbal
<input type="checkbox"/> Enterprising	<input type="checkbox"/> Promoter
<input type="checkbox"/> Competitive	<input type="checkbox"/> Friendly, mixes easily
<input type="checkbox"/> Enjoys challenge	<input type="checkbox"/> Enjoys popularity
<input type="checkbox"/> Problem solver	<input type="checkbox"/> Fun loving
<input type="checkbox"/> Productive	<input type="checkbox"/> Likes variety
<input type="checkbox"/> Bold	<input type="checkbox"/> Spontaneous
<input type="checkbox"/> Decision maker	<input type="checkbox"/> Enjoys change
<input type="checkbox"/> Strong willed	<input type="checkbox"/> Creative - new ideas
<input type="checkbox"/> Independent, self-reliant	<input type="checkbox"/> Group oriented
<input type="checkbox"/> Controlling	<input type="checkbox"/> Optimistic
<input type="checkbox"/> Persistent	<input type="checkbox"/> Initiator
<input type="checkbox"/> Action oriented	<input type="checkbox"/> Infectious laughter
<input type="checkbox"/> "Let's do it now"	<input type="checkbox"/> Inspirational
<input type="checkbox"/> Outgoing	<input type="checkbox"/> "Trust me! It'll work out"
<input type="checkbox"/> Hard charging	<input type="checkbox"/> Outgoing
<input type="checkbox"/> Not afraid to take risks	<input type="checkbox"/> Empathetic
<input type="checkbox"/> Task oriented	<input type="checkbox"/> People oriented
<input type="checkbox"/> Efficient	<input type="checkbox"/> Charming
<input type="checkbox"/> Disciplined	<input type="checkbox"/> Affable
<input type="checkbox"/> Organized	<input type="checkbox"/> Talkative
<input type="checkbox"/> Results oriented	<input type="checkbox"/> Trusting
<input type="checkbox"/> Gut based decisions	<input type="checkbox"/> Highly influential
<input type="checkbox"/> Purposeful and focused on attaining goals	<input type="checkbox"/> Gut based
<input type="checkbox"/> Assuming control	<input type="checkbox"/> Building quality relationships
<input type="checkbox"/> Achieving results	<input type="checkbox"/> Having fun
<input type="checkbox"/> Accepting personal challenges	<input type="checkbox"/> Attaining social recognition
<input type="checkbox"/> Create efficiency	<input type="checkbox"/> Trouble saying "no"
<input type="checkbox"/> Speak pointedly	<input type="checkbox"/> Tendency to over promise
<input type="checkbox"/> Direct	<input type="checkbox"/> Trouble managing time effectively
<input type="checkbox"/> Tell it like it is	<input type="checkbox"/> Problem solver
<input type="checkbox"/> Strong opinions	<input type="checkbox"/> Visionary – see the big picture
<input type="checkbox"/> Listen to headlines	<input type="checkbox"/> Avoid conflict
<input type="checkbox"/> Give me the highlights	<input type="checkbox"/> Goal oriented
<input type="checkbox"/> What's the bottom line	<input type="checkbox"/> Influence others
<input type="checkbox"/> Strong personality	<input type="checkbox"/> Work well with others
<input type="checkbox"/> Strategic	<input type="checkbox"/> Great communicator
<input type="checkbox"/> Tactical	<input type="checkbox"/> Function well on a team
<input type="checkbox"/> Visionary	<input type="checkbox"/> Positive energy
<input type="checkbox"/> Self directed	<input type="checkbox"/> Good customer service skills
<input type="checkbox"/> Responsible	<input type="checkbox"/> Solicits feedback
<input type="checkbox"/> Self managed	<input type="checkbox"/> Entrepreneur
<input type="checkbox"/> Natural born leader	<input type="checkbox"/> Risk taker
<input type="checkbox"/> Get involved	<input type="checkbox"/> Quick to make decisions
<input type="checkbox"/> Strong operational focus	<input type="checkbox"/> Like change
<input type="checkbox"/> Multi-tasker	<input type="checkbox"/> Moves fast
<input type="checkbox"/> Create win-win solutions	<input type="checkbox"/> Quick to implement decisions
<input type="checkbox"/> Strong decision maker	<input type="checkbox"/> Create trust in others
<input type="checkbox"/> Common sense approach to business	<input type="checkbox"/> Confident
<input type="checkbox"/> Put forth a heroic effort and play to win	<input type="checkbox"/> Limited patience

<input type="checkbox"/> Enjoys instructions <input type="checkbox"/> Accurate <input type="checkbox"/> Consistent <input type="checkbox"/> Controlled <input type="checkbox"/> Reserved <input type="checkbox"/> Predictable <input type="checkbox"/> Practical <input type="checkbox"/> Orderly <input type="checkbox"/> Factual <input type="checkbox"/> Conscientious <input type="checkbox"/> Perfectionist <input type="checkbox"/> Discerning <input type="checkbox"/> Inquisitive <input type="checkbox"/> Precise <input type="checkbox"/> Scheduled <input type="checkbox"/> Dry Humor <input type="checkbox"/> "How was it done in the past?" <input type="checkbox"/> Exact <input type="checkbox"/> Focused <input type="checkbox"/> Detailed <input type="checkbox"/> Neat <input type="checkbox"/> Systematic <input type="checkbox"/> Polite <input type="checkbox"/> Logical <input type="checkbox"/> Professional <input type="checkbox"/> Slow paced <input type="checkbox"/> Analytical <input type="checkbox"/> Compliant <input type="checkbox"/> Methodical <input type="checkbox"/> Driven by perfection <input type="checkbox"/> Need clear instructions on what's expected <input type="checkbox"/> "Tell me how you want it done and I'll do it" <input type="checkbox"/> Task oriented <input type="checkbox"/> Self directed <input type="checkbox"/> Prefer to work alone <input type="checkbox"/> Like to be informed <input type="checkbox"/> Analyze lots of data prior to making a decision <input type="checkbox"/> Introverted <input type="checkbox"/> Aloof <input type="checkbox"/> Critical <input type="checkbox"/> Risk-averse <input type="checkbox"/> Resistant to change <input type="checkbox"/> Objective and open minded to new information <input type="checkbox"/> Process driven <input type="checkbox"/> Quality driven <input type="checkbox"/> Function well within a structured environment <input type="checkbox"/> Great listening skills <input type="checkbox"/> Very good at remembering details <input type="checkbox"/> Uncanny ability to spot what is missing or broken <input type="checkbox"/> Diplomatic <input type="checkbox"/> Excellent with numbers <input type="checkbox"/> Persistent <input type="checkbox"/> Work at a steady pace <input type="checkbox"/> People can count on you <input type="checkbox"/> Like to gather lots of information <input type="checkbox"/> Make data-based decisions <input type="checkbox"/> Can follow someone else's proven process	<input type="checkbox"/> Sensitive feelings <input type="checkbox"/> Loyal <input type="checkbox"/> Calm, even keel <input type="checkbox"/> Non demanding <input type="checkbox"/> Avoids confrontation <input type="checkbox"/> Enjoys routine <input type="checkbox"/> Warm and relational <input type="checkbox"/> Humble <input type="checkbox"/> Gives in <input type="checkbox"/> Indecisive <input type="checkbox"/> Will do without <input type="checkbox"/> Adaptable <input type="checkbox"/> Sympathetic <input type="checkbox"/> Thoughtful <input type="checkbox"/> Nurturing <input type="checkbox"/> Tolerant <input type="checkbox"/> Peace Maker <input type="checkbox"/> "Let's keep things the way they are" <input type="checkbox"/> Dependable <input type="checkbox"/> Good natured <input type="checkbox"/> Systems oriented <input type="checkbox"/> Open minded <input type="checkbox"/> Consistent <input type="checkbox"/> Persistent <input type="checkbox"/> Level headed <input type="checkbox"/> Pragmatic <input type="checkbox"/> Sincere <input type="checkbox"/> Empathetic <input type="checkbox"/> Team player <input type="checkbox"/> People oriented <input type="checkbox"/> Introverted <input type="checkbox"/> Less emotional <input type="checkbox"/> Needs security <input type="checkbox"/> Wants stability <input type="checkbox"/> Strive to belong <input type="checkbox"/> Resistant to change <input type="checkbox"/> Make slow and informed decisions <input type="checkbox"/> "Play not to lose" <input type="checkbox"/> Seek to eliminate risk <input type="checkbox"/> Highly detailed <input type="checkbox"/> Very organized <input type="checkbox"/> Slow placed <input type="checkbox"/> Patient <input type="checkbox"/> Objective <input type="checkbox"/> Great listener <input type="checkbox"/> Easy to get along with and talk to <input type="checkbox"/> Prefer a predictable, structured environment <input type="checkbox"/> Timid <input type="checkbox"/> Possessive <input type="checkbox"/> Methodical <input type="checkbox"/> Process driven <input type="checkbox"/> Good memory <input type="checkbox"/> Team builder <input type="checkbox"/> Strong customer skills <input type="checkbox"/> Know how to build quality relationships <input type="checkbox"/> Highly analytical <input type="checkbox"/> Good communicator
--	---

## **Applicant: Please Read & Sign**

It is understood that the purpose of this questionnaire is for information only and is in no way binding upon the franchise company, its agents, representatives or the applicant. It is, however, understood that the applicant supplies this information contained herein to the best of his knowledge and ability and that the franchise company, its agents, representatives, rely on this fact in assessing the desirability and qualifications of the applicant. This application will serve as authorization for franchise company, its agents, or representatives to complete credit and other background checks.

Submitted this:	day of:	, 20
Name		
Signature		