



# CONFIDENTIAL PROFILE QUESTIONNAIRE

*Please complete all three pages of this form in full. The completion of this form does not obligate you in any fashion.*

## Personal

|                   |                |                               |
|-------------------|----------------|-------------------------------|
| Name:             | Date of Birth: | Married: <b>Yes</b> <b>No</b> |
| Partner/Spouse:   | Date of Birth: | Children:                     |
| Address:          |                |                               |
| City, State, Zip: |                |                               |
| Telephone - Home: | Cell Phone:    |                               |
| Telephone - Work: | Email:         |                               |

## Education

|                  |        |         |
|------------------|--------|---------|
| School Attended: | Years: | Degree: |
| School Attended: | Years: | Degree: |
| School Attended: | Years: | Degree: |

## Employment

|   |   |                  |
|---|---|------------------|
| <b>Current Employer:</b>  |   | Number of years: |
| Address:  |   | Income:          |
| City, State, Zip:   | Phone Number:                                 |                  |
| Position:   | Contact at work number?: <b>Yes</b> <b>No</b> |                  |
| <b>Previous Employer:</b>   |   | Number of years: |
| Address:  |   | Income:          |
| City, State, Zip:   | Phone Number:                                 |                  |
| Position:   |   |                  |
| Are you a U.S. Veteran?: <b>Yes</b> <b>No</b> If yes, number of years of service: |   |                  |

**Check the box below that best describes your business model interest and then give your market/city preference below.**

|             |            |                |                      |
|-------------|------------|----------------|----------------------|
| Single Unit | Multi-Unit | Area Developer | International Master |
| (1)         | (2)        | (3)            | (4)                  |

**What personal goals would you like to achieve by owning your own business?  
On a scale from 1-9, please rank each of the personal goals below with "9" being the most important.**

|                     |                    |                 |
|---------------------|--------------------|-----------------|
| Control of future   | Build a business   | Personal growth |
| Flixibility of time | Family involvement | Community       |
| Income level        | Build to sell      | Be my own boss  |

## How would you rate your following business skills?

|                          |           |           |      |      |      |
|--------------------------|-----------|-----------|------|------|------|
| <b>Sales:</b>            | Excellent | Very Good | Good | Fair | Poor |
| <b>Management:</b>       | Excellent | Very Good | Good | Fair | Poor |
| <b>Organization:</b>     | Excellent | Very Good | Good | Fair | Poor |
| <b>Financial:</b>        | Excellent | Very Good | Good | Fair | Poor |
| <b>Marketing:</b>        | Excellent | Very Good | Good | Fair | Poor |
| <b>Customer Service:</b> | Excellent | Very Good | Good | Fair | Poor |

Have you owned your own business before?    **Yes**    **No**

If yes, please explain:

How soon would you like to start your business:    Immediately    3 to 6 months    7 to 12 months    1 year+

**Please Check "Yes" or "No" to the attributes that best describe you.**

|                        |     |    |                     |     |    |                         |     |    |
|------------------------|-----|----|---------------------|-----|----|-------------------------|-----|----|
| <b>Amiable</b>         | Yes | No | <b>Controlling</b>  | Yes | No | <b>Independent</b>      | Yes | No |
| <b>Outgoing</b>        | Yes | No | <b>Flexible</b>     | Yes | No | <b>Diplomatic</b>       | Yes | No |
| <b>Persuasive</b>      | Yes | No | <b>Leader</b>       | Yes | No | <b>Direct</b>           | Yes | No |
| <b>Growth Oriented</b> | Yes | No | <b>Loyal</b>        | Yes | No | <b>Reliable</b>         | Yes | No |
| <b>Competitive</b>     | Yes | No | <b>Hard Working</b> | Yes | No | <b>Results Oriented</b> | Yes | No |
| <b>Money Oriented</b>  | Yes | No | <b>Risk Taker</b>   | Yes | No | <b>Open Minded</b>      | Yes | No |
| <b>Intuitive</b>       | Yes | No | <b>Considerate</b>  | Yes | No | <b>Organized</b>        | Yes | No |

**Personal and Business Categories Interests - Check all that apply**

|                              |  |                             |  |                      |  |
|------------------------------|--|-----------------------------|--|----------------------|--|
| Advertising/Direct Marketing |  | Green & Eco Friendly        |  | Repair/Restoration   |  |
| Automotive                   |  | Hair/Beauty Salons          |  | Restaurants          |  |
| Business Services            |  | Health & Fitness            |  | Senior Services      |  |
| Car/Boat Rentals             |  | Home Decor                  |  | Spa & Healthcare     |  |
| Child Education/Development  |  | Insurance & Tax             |  | Specialty Retail     |  |
| Cleaning/Maid                |  | Management Training         |  | Sports               |  |
| Coffee/Smoothies             |  | Packaging & Mailing         |  | Stands/Carts/Vending |  |
| Computer/Technology          |  | Pet Care                    |  | Storage              |  |
| Dry Cleaning/Laundry         |  | Print/Copy/Signs            |  | Tanning Salons       |  |
| Employment/Personnel         |  | Property Maintenance/Repair |  | Travel               |  |
| Financial Services           |  | Real Estate                 |  | Yogurt/Ice Cream     |  |

**Daily roles that I would enjoy, please check your choices.**

|  |      |        |     |
|--|------|--------|-----|
| Managing Employees                     | High | Medium | Low |
| Sales Prospecting                      | High | Medium | Low |
| Marketing                              | High | Medium | Low |
| Networking                             | High | Medium | Low |
| Customer Service                       | High | Medium | Low |
| Providing service quotes and estimates | High | Medium | Low |

**Explain other interests/hobbies you have outside your work environment:**

**\*To help you answer the financial questions below, you can use the attached financial worksheet.  
When saved to your desktop, it will automatically calculate totals for you.**

|   |    |
|---|----|
| *Your Net Worth                             | \$ |
| Cash Budgeted for Purchase of Business      | \$ |
| Additional Amount You're Willing to Finance | \$ |
| Income Needed to Maintain Current Lifestyle | \$ |
| *Current Total Annual Household Income      | \$ |

Would this business be your only source of income?    Yes    No

If no, please explain:

Would you characterize your credit as:    Great    Good    OK    Bad    Credit Score, if known:

Have you ever been convicted of a felony?    Yes    No

If yes, please explain:

Have you ever declared bankruptcy?    Yes    No

If yes, please explain:

# Personal Financial Information

(Use dollar amounts only - no decimals, spaces, or commas, then "TAB" to next entry)

## NET WORTH

| ASSETS                    | Dollars            | LIABILITIES              | Dollars |
|---------------------------|--------------------|--------------------------|---------|
| Stocks/Bonds/Mutual Funds | \$                 | Credit Card 1 Balance    | \$      |
| Retirement Accounts: IRA  | \$                 | Credit Card 2 Balance    | \$      |
| Retirement Accounts: 401K | \$                 | Credit Card 3 Balance    | \$      |
| Cash (Checking & Savings) | \$                 | Notes Payable - Bank     | \$      |
| Accounts/Notes Receivable | \$                 | Notes Payable - Bank     | \$      |
| Real Estate: Home         | \$                 | Mortgage Balance         | \$      |
| Real Estate:              | \$                 | Mortgage Balance         | \$      |
| Real Estate:              | \$                 | Mortgage Balance         | \$      |
| Automobile 1              | \$                 | Automobile 1 Balance     | \$      |
| Automobile 2              | \$                 | Automobile 2 Balance     | \$      |
| Automobile 3              | \$                 | Automobile 3 Balance     | \$      |
| Business (Value)          | \$                 | Secured Loans            | \$      |
| Other Assets:             | \$                 | Unpaid Real Estate Taxes | \$      |
| Other Assets:             | \$                 | Unpaid Income Taxes      | \$      |
| <b>TOTAL ASSETS</b>       | \$                 | <b>TOTAL LIABILITIES</b> | \$      |
|                           | <b>Net Worth =</b> | \$                       |         |

## ANNUAL INCOME

|                        |    |
|------------------------|----|
| Your Income            | \$ |
| Spouse's Income        | \$ |
| Other Income           | \$ |
| Total Household Income | \$ |