



# Sampson & Associates

**FRANCHISE & BUSINESS CONSULTANTS**

(Division of 1013654 Ontario Ltd.) Since (1982)

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Date: \_\_\_\_\_  
Name: \_\_\_\_\_ Address: \_\_\_\_\_  
City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_  
Phone: (\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_) \_\_\_\_\_ e-mail: \_\_\_\_\_

**“Analysis”** for a Prospective Franchise Business Owner:

We are interested in the success of any individual who is seeking to become a Business Owner with the assistance of a Franchising System.

Naturally the affordability for the purchaser is important but we wish to ensure that each individual has the correct perspective of the business to enable them to be successful. The Success of each Business Owner is our major objective. To these ends we would ask that you complete and return the below Analysis along with a brief of your financial position. *(We believe you will find this exercise beneficial).*

**COMPLETING THESE THREE SIMPLE PAGES WILL HELP YOU AND US MAKE THE RIGHT DECISION!**

1. WHICH OF MY PERSONAL SKILLS DO I BRING TO THE BUSINESS?

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2. WHAT PARTS OF MY WORKING HISTORY WOULD BE AN ASSET TO THE BUSINESS?

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3. WHAT INTERESTS ME ABOUT THIS PARTICULAR FRANCHISE?

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4. WHAT COMPONENTS OF RUNNING THIS BUSINESS WOULD I ENJOY?

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5. WHAT COMPONENTS OF RUNNING THIS BUSINESS WOULD I DISLIKE?

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6. WHAT PART OF RUNNING THIS BUSINESS INTRIGUES ME?

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7. WHAT PART OF RUNNING THIS BUSINESS SCARES ME?

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8. HAVE I SET REALISTIC GOALS? IF SO WHAT ARE THEY?

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9. WHAT DO I EXPECT IF I BUY A FRANCHISE?

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10. WHAT DO I SEE MY ROLE AS?

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How long have you been looking for a business? \_\_\_\_\_  
What Franchises/Businesses have you looked at? \_\_\_\_\_  
Would you be involved in the business full-time or part time? \_\_\_\_\_ Hours/week \_\_\_\_\_  
What would you see as your specific role in the business? \_\_\_\_\_

**HOW MUCH UNENCUMBERED CASH DO YOU HAVE TO INVEST? \$ \_\_\_\_\_**

**PERSONAL FINANCIAL INFORMATION**

**Assets (\$)**

Cash on hand \_\_\_\_\_  
RRSP/Securities \_\_\_\_\_  
Loans Receivable \_\_\_\_\_  
Real Estate - Market Value \_\_\_\_\_  
Automobiles - Market Values \_\_\_\_\_  
Other Assets \_\_\_\_\_  
**Total Assets** \_\_\_\_\_

**Liabilities (\$)**

Accounts Payable \_\_\_\_\_  
Unpaid Income Tax \_\_\_\_\_  
Credit Cards \_\_\_\_\_  
Mortgage Amount \_\_\_\_\_  
Other Liabilities \_\_\_\_\_  
**Total Liabilities** \_\_\_\_\_  
**Net Worth** \_\_\_\_\_

Desired Investment: Under \$100k \_\_\_\_\_ \$100-150k \_\_\_\_\_ \$150-200k \_\_\_\_\_ \$200k+ \_\_\_\_\_  
To ensure your business goals are achievable please indicate your desired earnings:

Year One \_\_\_\_\_ Year Two \_\_\_\_\_ Year Three \_\_\_\_\_

The undersign hereby certifies that the information given in the foregoing statement is true and that no unfavorable information known to me (us) or called for herein has been omitted. I understand that Sampson & Associates will accept this information as true and correct and will base its recommendations according to this information. If this information is proven to be incorrect Sampson & Associates may charge for their time spent. Sampson & Associates is hereby authorized to obtain such information as it may require concerning said statement, which at all times shall remain the property of Sampson & Associates. For the purpose of determining my eligibility for a Business relationship, you are authorized to procure consumer reports from credit reporting agencies and obtain personal and credit information from persons other than consumer reporting agencies. It is understood that all information provided in this form and obtained pertaining to same will be treated confidentially by Sampson & Associates.

**Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**Thank you for taking the time to complete this form. Please return via fax to 905-764-9341 or e-mail to [info@sampsonworldwide.com](mailto:info@sampsonworldwide.com).**

**Yours sincerely,**

*Lee Sampson*

**Lee Sampson**