**Franchise Disclosure Document (FDD) Application**

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## **General information**

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|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **General information (to be filled out by the 1st or sole applicant)** | | | | |
| First name | Initial | Last name | | |
| Home address | | | | |
| Home phone | Business phone | Mobile phone | | |
| Fax number | Email address | | | |
| Country of citizenship |  | | | |
| Country of main residency |
| Do you wish to work part-time or full-time? |
|  | | | | |
| **Co-owner information – Spouse (if no spouse, go to step 10)** | | | | |
| Spouse’s first name | Spouse’s occupation | | | |
| Country of citizenship | Number of children | | | |
| Does spouse want to work full or part time? | Proposed split of ownership? | | | |
|  | | | | |
| **Co-owner (non-spouse) (if applicable)** | | | | |
| First name | Initial | | | Last name |
| Relationship to co-owner |  | | | |
| Country of citizenship | Any children? | | | Have a spouse? |
| Does the co-owner want to work full or part time? | Proposed split of ownership? | | | |
|  | | | | |
| Will you need a work visa? | Will the co-owner need a work visa? | | | |
| Have you ever applied for a visa to work in the USA? If yes, please provide details. | | | | |
| How many times have you visited the USA? | Ever lived in the USA? | | Ever worked in the USA? | |
| What is your preferred timescale for relocating? | | | | |
| Continue to next page | | | | |
| Are you interested in traveling to Central Florida or the Florida Gulf Coast for an informational visit? We’ll give you a great discount on a vacation rental, show you around, and tell you all about owning an IPG franchise. (circle one)  Yes No | | | | |

## **Applicant 1**

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### **Form**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Applicant 1** | | | | | |
| First name | Initial | | | Last name | |
| Education information | | | | | |
| Name of school attended (pre-college) | | | Qualifications received | | |
| Age when left school | | |  | | |
| Name of college / university attended | | | Qualifications received | | |
| Any other higher education? If so, please provide details. | | | | | |
| Employment information | | | | | |
| Name of present employer or business | | | Employed or self employed? | | Since (date) |
| Present job title | | | Duties | | |
| Salary | | |  | | |
| Name of previous employer or business | | | Employed or self employed? | | From (date)  To (date) |
| Previous job title | | | Duties | | |
| Salary | | |  | | |
| Skills / experience | | | | | |
| Describe any management experience | | | | | |
| Describe any maintenance experience | | | | | |
| Referee information (if applicable) | | | | | |
| Business referee  Tel. | | Personal referee  Tel. | | | Additional referee  Tel. |
| Circle / check one   1. You may contact my referees at your convenience 2. Please do not contact my referee until I authorize you to do so | | | | | |

### **Financial information**

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#### **Assets**

Personal financial statement for 1st applicant

One statement is needed for each candidate, except where candidates are husband and wife. In this case, one statement will suffice. All figures should relate to the present-day values, estimated where necessary. Mark estimates with an “E”.

|  |  |  |  |
| --- | --- | --- | --- |
| **Assets** | **Candidate** | **Spouse** | **Joint** |
| Bank – current / checking account(s) |  |  |  |
| Bank – deposit account(s) |  |  |  |
|  | | | |
| National savings |  |  |  |
| Stocks & shares (quoted) |  |  |  |
| Stocks and shares (unquoted) |  |  |  |
| Fund available from pension plan (including a 401k, IRA, etc.) |  |  |  |
| Other liquid investments (please provide details) |  |  |  |
|  | | | |
| Main residence |  |  |  |
| Other non-U.S. property (if applicable) |  |  |  |
| U.S. property (if applicable) |  |  |  |
|  | | | |
| Endowment policies / mutual funds |  |  |  |
|  | | | |
| Motor vehicles |  |  |  |
|  | | | |
| Other assets (please provide details) |  |  |  |
|  | | | |
| **Total assets** |  |  |  |

#### **Liabilities**

|  |  |  |  |
| --- | --- | --- | --- |
| **Liabilities** | **Candidate** | **Spouse** | **Joint** |
| Bank - overdraft(s) |  |  |  |
| Bank – personal loan(s) |  |  |  |
| Other personal loan(s) |  |  |  |
| Credit card(s) |  |  |  |
| Income tax and other taxes |  |  |  |
| Mortgage against main residence |  |  |  |
| Mortgage(s) against other non- U.S. properties (if applicable) |  |  |  |
| Mortgage(s) against other U.S. properties (if applicable) |  |  |  |
| Other secured loan(s) |  |  |  |
| Car loans |  |  |  |
| Other debts – actual or contingent |  |  |  |
|  | | | |
| **Total liabilities** |  |  |  |

#### **Income**

|  |  |  |  |
| --- | --- | --- | --- |
| **Income** | **Candidate** | **Spouse** | **Joint** |
| Salary |  |  |  |
| Commission (if applicable) |  |  |  |
| Profit share / bonuses (if applicable) |  |  |  |
| Pension(s) |  |  |  |
| Bank deposit income |  |  |  |
| Interest from other investments |  |  |  |
| Rental income – non-U.S. property (if applicable) |  |  |  |
| Rental income – U.S. property (if applicable) |  |  |  |
| Other income (specify) |  |  |  |
| **Total income** |  |  |  |
| Outgoings | | | |
| Mortgage against main residence |  |  |  |
| Mortgage(s) against other non-U.S. properties (if applicable) |  |  |  |
| Mortgage(s) against U.S. properties (if applicable) |  |  |  |
| Other loans (specify) |  |  |  |
| Other outgoings (specify) |  |  |  |
| **Total outgoings** |  |  |  |

## **Applicant 2**

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### **Form**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Applicant 2** | | | | | |
| First name | Initial | | | Last name | |
| Education information | | | | | |
| Name of school attended (pre-college) | | | Qualifications received | | |
| Age when left school | | |  | | |
| Name of college / university attended | | | Qualifications received | | |
| Any other higher education? If so, please provide details. | | | | | |
| Employment information | | | | | |
| Name of present employer or business | | | Employed or self employed? | | Since (date) |
| Present job title | | | Duties | | |
| Salary | | |  | | |
| Name of previous employer or business | | | Employed or self employed? | | From (date)  To (date) |
| Previous job title | | | Duties | | |
| Salary | | |  | | |
| Skills / experience | | | | | |
| Describe any management experience | | | | | |
| Describe any maintenance experience | | | | | |
| Referee information (if applicable) | | | | | |
| Business referee  Tel. | | Personal referee  Tel. | | | Additional referee  Tel. |
| Circle / check one   1. You may contact my referees at your convenience 2. Please do not contact my referee until I authorize you to do so | | | | | |

### **Financial information**

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#### **Assets**

Personal financial statement for 2nd applicant

One statement is needed for each candidate, except where candidates are spouses. In this case, one statement will suffice. All figures should relate to the present-day values, estimated where necessary. Mark estimates with an **E**.

|  |  |  |  |
| --- | --- | --- | --- |
| **Assets** | **Candidate** | **Spouse** | **Joint** |
| Bank – current / checking account(s) |  |  |  |
| Bank – deposit account(s) |  |  |  |
|  | | | |
| National savings |  |  |  |
| Stocks & shares (quoted) |  |  |  |
| Stocks and shares (unquoted) |  |  |  |
| Fund available from pension plan (including a 401k, IRA, etc.) |  |  |  |
| Other liquid investments (please provide details) |  |  |  |
|  | | | |
| Main residence |  |  |  |
| Other non-U.S. property (if applicable) |  |  |  |
| U.S. property (if applicable) |  |  |  |
|  | | | |
| Endowment policies / mutual funds |  |  |  |
|  | | | |
| Motor vehicles |  |  |  |
|  | | | |
| Other assets (please provide details) |  |  |  |
|  | | | |
| **Total assets** |  |  |  |

#### **Liabilities**

|  |  |  |  |
| --- | --- | --- | --- |
| **Liabilities** | **Candidate** | **Spouse** | **Joint** |
| Bank - overdraft(s) |  |  |  |
| Bank – personal loan(s) |  |  |  |
| Other personal loan(s) |  |  |  |
| Credit card(s) |  |  |  |
| Income tax and other taxes |  |  |  |
| Mortgage against main residence |  |  |  |
| Mortgage(s) against other non- U.S. properties (if applicable) |  |  |  |
| Mortgage(s) against other U.S. properties (if applicable) |  |  |  |
| Other secured loan(s) |  |  |  |
| Car loans |  |  |  |
| Other debts – actual or contingent |  |  |  |
|  | | | |
| **Total liabilities** |  |  |  |

#### **Income**

|  |  |  |  |
| --- | --- | --- | --- |
| **Income** | **Candidate** | **Spouse** | **Joint** |
| Salary |  |  |  |
| Commission (if applicable) |  |  |  |
| Profit share / bonuses (if applicable) |  |  |  |
| Pension(s) |  |  |  |
| Bank deposit income |  |  |  |
| Interest from other investments |  |  |  |
| Rental income – non-U.S. property (if applicable) |  |  |  |
| Rental income – U.S. property (if applicable) |  |  |  |
| Other income (specify) |  |  |  |
| **Total income** |  |  |  |
| Outgoings | | | |
| Mortgage against main residence |  |  |  |
| Mortgage(s) against other non-U.S. properties (if applicable) |  |  |  |
| Mortgage(s) against U.S. properties (if applicable) |  |  |  |
| Other loans (specify) |  |  |  |
| Other outgoings (specify) |  |  |  |
| **Total outgoings** |  |  |  |

## **Sign certificate**

Certificate to be read and signed by each applicant.

The undersigned acknowledges and agrees that:

1. IPG Franchising, Inc. will not incur any obligation or liability due to receipt of this candidate profile.
2. IPG Franchising, Inc. may make reasonable use of the information contained therein with a view of assessing the suitability of the candidate to receive the Franchise Disclosure Document (FDD).
3. Any material misrepresentation in the information contained within or omitted form the candidate profile shall be grounds upon which IPG Franchising, Inc. may terminate any agreements that may be entered into between IPG Franchising, Inc. and the undersigned.

I hereby confirm that all the information contained within the candidate profile, including financial information, is correct as at a date not earlier than 30 days prior to the date of signature and is accurate in all material respects to the best of my knowledge and belief. I give / do not give **(delete as appropriate)** IPG Franchising, Inc. permission to contact the referees state on the profile forms.

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Name of applicant)**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Signed)**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Name of spouse or co-owner)**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Signed)**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **(Date)**