



FRANCHISE APPLICATION PACKAGE



FRANCHISE APPLICATION

(PLEASE COMPLETE & RETURN TO SERIOUS COFFEE)

Please provide all requested information and pay close attention to instructions given throughout the package. Incorrect or incomplete documentation will result in a delay in processing your request.

1. PERSONAL INFORMATION

LAST NAME: _____ FIRST NAME: _____ MIDDLE INITIAL: _____ MALE/FEMALE

HOME ADDRESS: _____ CITY: _____ PROVINCE: _____

POSTAL CODE: _____

MAILING ADDRESS IF DIFFERENT FROM HOME ADDRESS: _____

PHONE: HOME: (____) _____ BUS: (____) _____ CELL: (____) _____ FAX: (____) _____

E-MAIL: _____

Indicate which method & what time of day is best to contact you: _____

Date of Birth: ____/____/____ SIN: _____ Citizenship: _____

Marital Status: ☐ Married ☐ Single ☐ Other (please specify) _____

Number of Dependents: _____ Ages of Dependents: _____

CO-APPLICANT: (IF APPLICABLE) Co-applicant must complete separate application

LAST NAME: _____ FIRST NAME: _____ MIDDLE INITIAL: _____ MALE/FEMALE

RELATIONSHIP TO YOU: _____

PHONE: HOME: (____) _____ BUS: (____) _____ CELL: (____) _____ FAX: (____) _____

E-MAIL: _____

Indicate which method & what time of day is best to contact you: _____

2. EDUCATIONAL BACKGROUND

What is your highest educational level *successfully* completed?

☐ Grade School ☐ High School ☐ Vocational/Community College ☐ University

☐ Post Graduate University ☐ Other: _____

Name of Academic Institution: _____ Year Graduated: _____

Degree(s)/Diploma(s) Attained: _____



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3. WORK OR BUSINESS EXPERIENCE

Do we have permission to contact those listed below? **YES/NO**

Present Employer

Name of Company: _____

Contact Name: _____ Phone: (____) _____

Nature of Company: _____ Location of Company: _____

Your Position: _____ Responsibilities: _____

Duration of Employment: Start Date: _____ End Date: _____

Salary/Remuneration: _____/HR _____/MO _____/YR

Reason for Leaving: _____

Managerial References Attached: **YES/NO**

Past Employer

Name of Company: _____

Contact Name: _____ Phone: (____) _____

Nature of Company: _____ Location of Company: _____

Your Position: _____ Responsibilities: _____

Duration of Employment: Start Date: _____ End Date: _____

Salary/Remuneration: _____/HR _____/MO _____/YR

Reason for Leaving: _____

Managerial References Attached: **YES/NO**

4. PERSONAL REFERENCES

Do we have permission to contact those listed below? **YES/NO**

1. Name: _____ Occupation: _____

Address: _____ Telephone: _____

Relationship: _____ Best Time to Contact: _____



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2. Name: _____

Occupation: _____

Address: _____

Telephone: _____

Relationship: _____

Best Time to Contact: _____

5. FINANCIAL REFERENCES/INFORMATION

Do we have permission to contact those listed below? **YES/NO**

1. Financial Institution: _____

Address: _____

Contact: _____

Telephone: _____

Length of Time with Institution: _____

2. Financial Institution: _____

Address: _____

Contact: _____

Telephone: _____

Length of Time with Institution: _____

3. How do you intend to finance your purchase?

☐ Own funds

☐ Partnership

☐ Own Funds & Borrow from Financial Institution

☐ Other, Explain: _____

4. How would you rate your credit rating?

☐ Excellent

☐ Satisfactory

☐ Poor

5. Have you ever been self-employed? **YES/NO**

If yes, what type of business? _____ Name of Business: _____

Province in which Business was/is Located: _____ Years in Operation: _____

Last Date Involved in Business: _____

Reason for no longer being involved with business: _____

6. Have you or a company you've owned or co-owned ever declared bankruptcy? **YES/NO**

If yes, please complete the following information:

Name of Business: _____

Year of Bankruptcy: _____

Year Discharged from Bankruptcy: _____

Province in which Company Registered: _____



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10. From a business perspective, what would you say is your greatest...

Strength(s): _____

Weakness (es): _____

11. List your hobbies, special interests, community activities, etc:

12. What are your expectations by owning a Serious Coffee franchise?

13. What annual income after expenses do you hope to generate from your business?

1st year: _____ 2nd year: _____ 3 – 5 years: _____

14. If you have a partner in the business, will they be active in the day-to-day operations? **YES/NO**

15. Will friends, family or associates be helping you? **YES/NO**

If so, who are they? _____ How will they help? _____

16. Why do you think you will succeed as a Serious Coffee franchisee?

17. Given that the success or failure of your business is primarily your responsibility, what would you do to promote your business? _____

18. Give an example where you have hired, trained and/or motivated staff or why you believe you will be a strong manager of people:



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19. Give an example of how you'd handled a disgruntled or dissatisfied customer:

20. What percentage do you feel is it the Franchisor's responsibility to ensure success? _____

21. What percentage do you feel is the Franchisee's responsibility to ensure success? _____

22. What are your expectations surrounding the type of support you should receive from the Franchisor?

23. How would you handle a situation where you were dissatisfied with a particular program or event that Head Office has planned for the chain?

24. What are the top three incentives for you to become a part of a franchise business model?

1st: _____ 2nd: _____ 3rd: _____

25. What are the top three disadvantages with you becoming a part of a franchise business model?

1st: _____ 2nd: _____ 3rd: _____

26. Should you be approved what kind of timeline do you foresee in which you will be operating your café?

27. What do you need to do before you are free to move forward with becoming an owner of a franchise?

28. What courses, certificates, etc have you achieved in preparation for running your own business?

29. What type of self-education do you foresee that you will require to confidently operating a franchise?

30. How many hours per day and how many days per week do you anticipate you will work in the café?



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31. How long do you anticipate it will take to recoup your initial investment and begin to make a profit?

32. What, in your opinion, is the key attribute, vision or skill that you bring to Serious Coffee?



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7. PERSONAL FINANCIAL INFORMATION

As of (Date) _____

Name of Applicant: _____

ASSETS

Cash on Hand \$ _____

RRSPs: (List) _____

_____ \$ _____

Non-RRSP

Stock \$ _____

Mutual Funds \$ _____

GICs, Term Deposits,
Canada Savings Bonds \$ _____

Other(List): _____

_____ \$ _____

Personal Assets

Principal Residence

(Market Value) \$ _____

(Submit copy of most recent property assessment)

Household Furnishings \$ _____

Vehicle: _____ \$ _____

Vehicle: _____ \$ _____

Campers, Boats, Etc. \$ _____

Other Real Estate

(Net of Loans & Debts)

Business (if self employed) \$ _____

(Submit copy of most recent property assessment)

Farm Assets \$ _____

(Submit copy of most recent property assessment)

Other (List):

_____ \$ _____

TOTAL ASSETS

\$

LIABILITIES

Mortgage on Primary Residence \$ _____

Bank Loans (List):

_____ \$ _____

_____ \$ _____

Other Real Estate Loans \$ _____

Credit Card(s) (List Type, Limit & Outstanding Balance)

_____ / _____ \$ _____

_____ / _____ \$ _____

_____ / _____ \$ _____

Other Liabilities (Type & Balance)

_____ \$ _____

_____ \$ _____

TOTAL LIABILITIES

\$

NET WORTH

(Total Assets minus Total Liabilities)

\$



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CURRENT MONTHLY INCOME

Salary \$ _____

Spouse's Salary \$ _____

Other Income \$ _____

TOTAL INCOME

\$

CURRENT NET MONTHLY EXPENSES

Rent/Mortgage \$ _____

Utilities \$ _____

Car Expenses \$ _____

RRSP \$ _____

Other \$ _____

TOTAL EXPENSES

\$

I hereby certify that to the best of my knowledge all information provided in this application is true and correct. It is expressly understood that this Franchise Application Form is not binding upon either San Juan Coffee Roasting Company Ltd. dba Serious Coffee or the undersigned as this report is intended to assist Serious Coffee in evaluating your personal and financial qualifications (as a Franchisee). I authorize San Juan Coffee Roasting Company Ltd. dba Serious Coffee to make any credit checks it deems necessary, and authorize any person or consumer reporting agency to complete and furnish to San Juan Coffee Roasting Company Ltd. dba Serious Coffee any information it may have or obtain in response to your credit inquiries. I understand that any false information or consequential omission contained in this application would be cause for immediate terminations of any subsequent agreements reached between myself and San Juan Coffee Roasting Company Ltd. dba Serious Coffee.

Applicant Signature: _____ Date: _____



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Confidentiality and Non-Disclosure Agreement

I understand that signing this agreement places me in a legally binding contract with San Juan Coffee Roasting Company Ltd. dba Serious Coffee. Upon completion and approval of the first stage in becoming a Serious Coffee franchisee, San Juan Coffee Roasting Company Ltd. dba Serious Coffee agrees to provide the undersigned pertinent confidential and proprietary documents and information relating to San Juan Coffee Roasting Company Ltd. dba Serious Coffee.

I undersigned agrees that this and any subsequent information received will be held in the strictest of confidence and only used for the sole intention of evaluation of a San Juan Coffee Roasting Company Ltd. dba Serious Coffee outlet for the purpose of negotiating a San Juan Coffee Roasting Company Ltd. dba Serious Coffee Franchise. The undersigned further agrees this information shall only be made available to his/her financial and legal advisors, and then only under the terms and conditions that are set forth herein.

In the event that it is determined that there is no interest in negotiating the acquisition of a Serious Coffee Franchise, all documents and information provided shall be returned to Serious Coffee. No disclosure or transfer of information provided may be made to any other party at any time. **(Each person represented by this document must complete the following information)**

Signed: _____

Date: _____

Print Name: _____

Place: _____

Signed: _____

Date: _____

Print Name: _____

Place: _____

Witness: _____

Date: _____

Print Name: _____

Place: _____