

# ERIK'S DELICAFÉ FRANCHISES, INC.

## CONFIDENTIAL EVALUATION REPORT

### BACKGROUND INFORMATION

Your full name: \_\_\_\_\_ Spouse's name: \_\_\_\_\_  
Social Security Number: \_\_\_\_\_ Spouse's Social Security Number: \_\_\_\_\_  
Your date of birth: \_\_\_\_\_ Spouse's date of birth: \_\_\_\_\_  
Number of children: 0 1 2 3 4 \_\_\_\_\_ Ages: \_\_\_\_\_  
Current address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_  
Zip code: \_\_\_\_\_  
Phone number: \_\_\_\_\_ Best time to contact you: \_\_\_\_\_  
Number of years at this address: \_\_\_\_\_ Own:  Rent:   
Previous address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_  
Zip code: \_\_\_\_\_  
Number of years at this address: \_\_\_\_\_ Own:  Rent:   
Your highest year of education completed: \_\_\_\_\_  
High school: 1 2 3 4 College: 1 2 3 4 Graduate: 5 6 7 8  
Degree(s) awarded: \_\_\_\_\_ Major(s): \_\_\_\_\_  
Name of college/university: \_\_\_\_\_ Location: \_\_\_\_\_  
Hobbies or other interests: \_\_\_\_\_

### REFERENCES

#### Business references: (please list two)

Company: \_\_\_\_\_ Name: \_\_\_\_\_ Phone: \_\_\_\_\_  
Company: \_\_\_\_\_ Name: \_\_\_\_\_ Phone: \_\_\_\_\_

#### Personal references: (please list two)

Company: \_\_\_\_\_ Name: \_\_\_\_\_ Phone: \_\_\_\_\_  
Company: \_\_\_\_\_ Name: \_\_\_\_\_ Phone: \_\_\_\_\_

### FINANCIAL POSITION

#### Assets

Cash (checking account) \_\_\_\_\_  
Cash (savings/others) \_\_\_\_\_  
IRA or ESOP \_\_\_\_\_  
Real Estate (residence) \_\_\_\_\_  
Real Estate (other) \_\_\_\_\_  
Automobiles \_\_\_\_\_

#### Liabilities

Mortgage payable \_\_\_\_\_  
Taxes payable \_\_\_\_\_  
Credit Card balances \_\_\_\_\_  
Other liabilities: \_\_\_\_\_

**FINANCIAL POSITION (CONTINUED)**

Other assets: (please list) \_\_\_\_\_

Total Assets: \_\_\_\_\_

Total Liabilities: - \_\_\_\_\_

Net Worth: = \_\_\_\_\_

**Annual Cash Flow**

**Annual Expenses**

Salary \_\_\_\_\_

Housing \_\_\_\_\_

Commissions \_\_\_\_\_

Personal expenses \_\_\_\_\_

Investment income \_\_\_\_\_

Installment loans \_\_\_\_\_

Rental income \_\_\_\_\_

Taxes \_\_\_\_\_

Other income \_\_\_\_\_

Other expenses \_\_\_\_\_

Total income \_\_\_\_\_

Total expenses \_\_\_\_\_

Intended method of financing your Franchise: \_\_\_\_\_

Describe any business partners, investors, or family members who will be involved:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**ADDITIONAL INFORMATION**

Where did you hear about our Franchise Program? \_\_\_\_\_

In what city or county would you prefer to locate an Erik's DeliCafé? \_\_\_\_\_

Are you considering any other franchises: Yes:  No:

Name(s): \_\_\_\_\_

I, the undersigned, do hereby acknowledge that the information contained herein is true and complete as of the date written below. My signature also authorizes Erik's DeliCafé Franchises, Inc. to make credit and/or character reference checks. THIS IS NOT A CONTRACT AND DOES NOT OBLIGATE EITHER MYSELF OR ERIK'S DELICAFÉ FRANCHISES, INC. IN ANY WAY.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

