



## Buyer Qualification Profile

# **CONFIDENTIAL**

*The more we understand your needs, wants, goals and values, the better we will be able to assist you.*

### Contact information

<b>Name</b>	
<b>Address</b>	
<b>City, State, Zip</b>	
<b>Home Phone</b>	
<b>Office Phone</b>	
<b>Cell</b>	
<b>Fax</b>	
<b>Email</b>	

**Instructions:** This is a type on document. First save to your computer, fill in your information and return via email. You can also print and fax it to:

### **MURPHY OFFICE: Sacramento**

NAME: Andrew Rogerson

ADDRESS: 777 Campus Commons Road, Suite 200

PHONE: (916) 570 2674

CELL:

FAX: (916) 473-8655

WEB: [www.Andrew-Rogerson.com](http://www.Andrew-Rogerson.com)

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## **PERSONAL and BUSINESS INFORMATION**

Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

U.S. Citizen  Yes  No

Own  Rent How long? \_\_\_\_\_

Telephone Numbers: Home (\_\_\_\_\_) \_\_\_\_\_ Work ( )

Cell (\_\_\_\_\_) \_\_\_\_\_ Fax(\_\_\_\_\_) \_\_\_\_\_

Email \_\_\_\_\_

Best time to call: \_\_\_\_\_

Education:  High School  Bachelors  Masters  PhD  Other

University or College(s) Attended \_\_\_\_\_

Major(s) \_\_\_\_\_ Year Graduated \_\_\_\_\_

Employment: Current occupation \_\_\_\_\_

Type of Business \_\_\_\_\_

Title/Position \_\_\_\_\_

Length of Employment \_\_\_\_\_ Salary \_\_\_\_\_

Responsibilities: *(attach resume if available)* \_\_\_\_\_

Professional affiliations \_\_\_\_\_

Previous Employment \_\_\_\_\_

Type of Business \_\_\_\_\_

Spouse's Current Employment \_\_\_\_\_

Type of Business \_\_\_\_\_

Title/Position \_\_\_\_\_ Length of Employment \_\_\_\_\_ Salary \_\_\_\_\_

Have you ever owned or operated a business?  Yes  Full-time

Part-time  No

If yes, explain \_\_\_\_\_

What attracts you to owning your own business now? \_\_\_\_\_

What did you like MOST about your past job or business? \_\_\_\_\_

What did you like LEAST about your past job or business? \_\_\_\_\_

What do you consider your GREATEST achievement? \_\_\_\_\_

On the basis of your work experience, your strengths are? \_\_\_\_\_

Your weaknesses are? \_\_\_\_\_

Would you enjoy owning a business where you:

Consult  Sell  Market  (check all that apply) your product or service?

How do you rate your sales ability? Weak  Average  Strong  Very strong

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Why are you considering a change from employment at this time? \_\_\_\_\_

In terms of purchasing a business or franchise I am:  Mildly Interested

Very Interested  Ready To Purchase

Do you have any experience in:  Advertising/Marketing  Public Relations

Sales  Management  Customer Service  Finance

Will you devote full time to your business?  Yes  No

How did you **first** become aware of Murphy?

Friend/Associate  Magazine Ad  Newspaper Ad  Web Site

Mailer

Magazine/Newspaper  Existing Franchise  Other \_\_\_\_\_

Name of source checked above \_\_\_\_\_

How would you rank your family's support of starting a new business?

Fair  Medium  Good  Very Good

Explain: \_\_\_\_\_

Will family members be involved with you in the business?  Yes  No

Whom \_\_\_\_\_

### **How would you rate your following business skills?**

Sales Average  Good  Very Good  Excellent

Management Average  Good  Very Good  Excellent

Organization Average  Good  Very Good  Excellent

Financial Average  Good  Very Good  Excellent

Marketing Average  Good  Very Good  Excellent

Customer Service Average  Good  Very Good  Excellent

### **Rank the most important starting with 1 and the least important 10**

Control My Future \_\_\_\_\_ Build a Business \_\_\_\_\_ Personal Growth \_\_\_\_\_

Flexible Time \_\_\_\_\_ Family Involvement \_\_\_\_\_ Community Involvement \_\_\_\_\_

Income Level \_\_\_\_\_ Build to Sell \_\_\_\_\_ Be My Own Boss \_\_\_\_\_

Other \_\_\_\_\_

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**Please select the attributes that best describe you.**

- |                 |                          |                  |                          |
|-----------------|--------------------------|------------------|--------------------------|
| Amiable         | <input type="checkbox"/> | Reliable         | <input type="checkbox"/> |
| Controlling     | <input type="checkbox"/> | Competitive      | <input type="checkbox"/> |
| Independent     | <input type="checkbox"/> | Hard Working     | <input type="checkbox"/> |
| Outgoing        | <input type="checkbox"/> | Results Oriented | <input type="checkbox"/> |
| Flexible        | <input type="checkbox"/> | Money Oriented   | <input type="checkbox"/> |
| Diplomatic      | <input type="checkbox"/> | Risk Taker       | <input type="checkbox"/> |
| Persuasive      | <input type="checkbox"/> | Open Minded      | <input type="checkbox"/> |
| Leader          | <input type="checkbox"/> | Intuitive        | <input type="checkbox"/> |
| Direct          | <input type="checkbox"/> | Considerate      | <input type="checkbox"/> |
| Growth Oriented | <input type="checkbox"/> | Understanding    | <input type="checkbox"/> |
| Loyal           | <input type="checkbox"/> | Spontaneous      | <input type="checkbox"/> |

How long have you been researching business and franchise opportunities?

\_\_\_\_\_

How will you know when you have found the right business? \_\_\_\_\_

In what geographical area would you like to operate your business? \_\_\_\_\_

How soon do you want to start this business? \_\_\_\_\_

Whatever success you have enjoyed in your past business experience, many people are looking for something different and better; please share the three most significant "changes" that you would like to overcome by owning your own business, being your own boss:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

What business categories do you have an interest in? \_\_\_\_\_

What kind of business hours are you interested in?

Part-time  Full-time  Management

Is the opportunity to have a multiple unit operation important to you?

Yes  No

**Daily roles you would enjoy:**

- |                    |                              |                             |
|--------------------|------------------------------|-----------------------------|
| Managing Employees | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| Sales prospecting  | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| Marketing          | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| Networking         | Yes <input type="checkbox"/> | No <input type="checkbox"/> |

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Customer Service Yes  No   
Providing service quotes & estimates Yes  No

Please describe below the most important things to you in choosing a business (these can include but are not limited to money, success, lifestyle, learning, challenge, fun, personal satisfaction, achievement or anything else that you think is important):

\_\_\_\_\_ Have you ever been convicted of a felony?  Yes  No

If yes, explain \_\_\_\_\_

Have you ever filed bankruptcy?  Yes  No

Have you ever been an officer in a company that has declared bankruptcy?  
 Yes  No

Cash Available for investment in a business \$\_\_\_\_\_

Do you have a source for additional funds without obtaining a business loan?

Yes  No If yes, please explain \_\_\_\_\_

Monthly household overhead \$\_\_\_\_\_

How will you cover your monthly living expenses as you build the business?

\_\_\_\_\_ Do you want to supplement or replace your current income? \_\_\_\_\_

### **Business Characteristics**

My ideal business would look something like this (check most appropriate answer in each case):

Proven, easily replicated system	<input type="checkbox"/> important	<input type="checkbox"/> somewhat	<input type="checkbox"/> don't care
Recognized business or franchise brand	<input type="checkbox"/> important	<input type="checkbox"/> somewhat	<input type="checkbox"/> don't care
Potential for significant growth	<input type="checkbox"/> important	<input type="checkbox"/> somewhat	<input type="checkbox"/> don't care
Potential for longevity of the business is	<input type="checkbox"/> important	<input type="checkbox"/> somewhat	<input type="checkbox"/> don't care
Image of business interested in needs	<input type="checkbox"/> professional	<input type="checkbox"/> don't care as long as it meets	

(check all that apply)

Business location is based at

automotive  retail food  service business services  home/personal services  
 store front  home office  commercial office  
 calling on customers in their business or  calling on customers in their home

Business environment

casual  suit and tie  don't care

Competition would be

high  moderate  low

Customer type desired care

repeat  businesses  general public  don't

Employee type desired care

blue collar  white collar  skilled  don't

Number of employees

10+  5-9  none to 4

Product versus service

products  services  both

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- Your cash investment level  \$100k  \$50-99k  \$25-49k
- Maturity of business  a mature, well-established business w/strong support and structure  
 a young, developing business w/good support, but more flexibility  
 a ground floor opportunity, offering the highest potential reward or risk
- Who will make decision (check all that applies)  me  spouse  other
- Management style  actively involved in all aspects of the business  
 develop employees and delegate responsibilities
- Timeframe for being in business  3 – 6 mos.  1- 3 mos.  now
- Timeframe for deciding  3 – 6 mos.  1- 3 mos.  now
- Growth  multiple units prefer one unit if same monetary success is possible
- Your need for personal income  1+ year  6 – 9 mos.  3 – 6 mos.
- Hours of business  prepared to work whatever hours needed to launch the business  
 willing to work nights & weekends as retail may require  
 only interested in traditional business hours
- Preferred roles in the business  customer service  
 management of staff  
 management of operations  
 prospecting for business, sales of product or service  
 marketing, networking, developing referral sources
- Risk/Opportunity  want to 'cherry pick' locations or markets by being  among the first in my community to open the business  
 prefer to wait until others are already in business in my market to benefit from their experience
- Income  goal is make the maximum income possible  
 seeking to grow and sell business  
 plan to slow down when goals are met
- How do you want your family and friends to perceive your business?  Contributes to society  
 My business' tangible assets exhibit my financial success  
 My previous experience was a key factor for entry and success  I don't care

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## FINANCIALS

### ***ASSETS***

### ***LIABILITES & NET WORTH***

Cash In Banks (itemize)	\$		Notes Due Banks and Others (itemized)	\$	
	\$			\$	
	\$			\$	
Marketable Stocks & Bonds	\$		Taxes Payable	\$	
	\$			\$	
Life Insurance Cash Surrender Value	\$		Loans	\$	
	\$			\$	
<b><i>TOTAL CURRENT ASSETS</i></b>	\$		<b><i>TOTAL CURRENT LIABILITIES</i></b>	\$	
	\$			\$	
Real Estate Owned	\$		Real Estate Mortgages	\$	
Other Assets	\$		Other Liabilities	\$	
	\$			\$	
Retirement Accounts	\$			\$	
IRAs	\$		<b><i>TOTAL NON-CURRENT LIABILITIES</i></b>	\$	
401k	\$		<b><i>TOTAL LIABILITES</i></b>	\$	
<b><i>TOTAL NON-CURRENT ASSETS</i></b>	\$		<b><i>NET WORTH</i></b>	\$	
<b><i>TOTAL ASSETS</i></b>	\$		<b><i>TOTAL LIABILITES &amp; NET WORTH</i></b>	\$	

<b>SOURCE OF ANNUAL INCOME</b>		<b>ESTIMATE OF ANNUAL EXPENSES</b>	
Salary			Mortgage Payments
Bonus & Commissions			Automobile Payments or Lease
Dividends			Insurance Premiums
Other Income			Other Expenses
<b>TOTAL</b>			<b>TOTAL</b>

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I certify that the information I have provided on this application is complete and correct. I authorize the release of this information to obtain verification of any of the above information. The purpose of this questionnaire is to compile general information and is not binding upon either part.

**THIS IS NOT A CONTRACT**

Yes I agree  Name: \_\_\_\_\_

Do you know anyone who would benefit from the services offered by Andrew Rogerson?

If so, may we contact them?

Name: \_\_\_\_\_ Phone: ( \_\_\_\_\_ ) \_\_\_\_\_

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