

**FRANCHISEE
APPLICATION FORM**



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PERSONAL DETAILS

Surname	
First name/s	
Place of birth	Nationality
Date of birth	ID number
Residential address	
Code	
Postal address	
Code	
Telephone (Business)	Telephone (Home)
Cell	E-mail
ID	Fax
At present address Years Months	Our residential property is Owned Rented By Self Spouse
Number of Dependents / Number of children	Their ages

DETAILS OF NEXT OF KIN

Name and residential address of next of kin (not of the same address)
Relationship:

Name
Address
Code
Telephone

EMPLOYMENT HISTORY					
Employer	From	To	Type of work	Last position held	Annual income
1.					
2.					
3.					
4.					

EDUCATION (kindly include a CV)	
Highest standard passed	Year
Do you have a degree or diploma? Yes No	If Yes, specify
Do you have any business knowledge? Yes No	If Yes, specify

BUSINESS EXPERIENCE		
Have you ever managed or operated a business which can be compared to Excell Catering Equipment?		
Have you ever previously owned a franchised business? (Please tick) Yes No If yes, namely		
Period owned if sold:	Why did you sell it?	
Have you had any experience in the following areas? (Please tick)		
Sales and Marketing	Yes	No
Financial Administration	Yes	No
Customer Service	Yes	No

GENERAL INFORMATION

Is it your intention to run the business on a full-time basis?

When are you available to commence with training?

What is your greatest achievement so far? (business or personal)

What are your long term business and career goals?

What are your prime objectives & personal reasons for applying for this franchise?

What personal strengths would you bring to the business?

What skills do you have that will enable you to make a success of an Excell Catering Equipment franchise?

What experience do you have in running a business?

What experience do you have in liaising or dealing with customers?

What do you think is the single most important thing in running an Excell Catering Equipment franchise?

What promotional ideas / local area marketing initiatives do you have for the business (PR and marketing)?
What do you think makes a business of this nature work?
What is your current knowledge on the nature of the Excell Catering Equipment business?
With the time commitments required from this business what sacrifices are you likely to have to make?
What level of support are you expecting from your Franchisor?
Any other comments you wish to make?

GENERAL INFORMATION – please circle the answer most appropriate to you

1. In the work environment, I feel:
 - a. I need a holiday every now and again
 - b. best when I work really hard
 - c. best when I am rewarded for what I do well
 - d. more secure when I am being supervised
2. Financially I am:
 - a. very conservative
 - b. very liberal
 - c. have always been able to put money aside
 - d. have never been well off
3. Taking directions from others helps me function:
 - a. optimally
 - b. better than if none
 - c. fine, at appropriate times
 - d. detrimentally
4. I find work-related pressure helps me function:
 - a. optimally
 - b. better than if none
 - c. fine, at appropriate times
 - d. detrimentally
5. My greatest strength at work is:
 - a. the ability to sell things
 - b. understanding people
 - c. physical strength
 - d. emotional warmth
6. I have obtained success in my life by:
 - a. being lucky
 - b. being happy in what I'm doing
 - c. taking risks
 - d. having good contacts
7. I believe business success comes from:
 - a. a desire to learn
 - b. a happy & stable personal life
 - c. extensive business experience
 - d. a tertiary qualification
8. When a superior tells me what to do, I :
 - a. wish I had his job so I could give orders
 - b. often try to present a new, more efficient way of doing the task
 - c. secretly resent being ordered around
 - d. learn from the instructions and complete the task
9. I have been best known for:
 - a. community involvement
 - b. good general business knowledge and skills
 - c. being a good parent
 - d. working in a large company

10. My priority for owning my own business is:
- giving jobs to my family
 - be liked and respected by staff
 - be able to determine own working time
 - have control over my own finances
11. Work hours should be:
- as long as is needed
 - paid for well
 - flexible.....long only when needed
 - equally split amongst all employees
12. In dealing with clients, it is important:
- to accept all types
 - to express yourself openly
 - to be outreach orientated
 - to be charitable
13. I would like to go into the franchise, as I:
- am dissatisfied in my current position
 - want to apply my extensive business experience to franchising
 - have excellent sales skills
 - have tried many jobs and career paths
14. By nature I am:
- highly spontaneous
 - highly goal-orientated
 - a quick decision maker
 - need a lot of time to make important decisions
15. I would best describe myself as being:
- an emotional person
 - a logical/thinker type person
 - a driving person
 - a creative person
16. In managing and relating to staff, I can best be described as:
- laid-back
 - an excellent delegator
 - a good motivator achieving maximum results
 - giving orders and expecting results
17. I believe I am most effective when:
- I am left to work alone
 - I can delegate tasks to my staff
 - I have a good team of support staff to work with

<p>Adapted from: Joseph Mancuso & Donald Borain, How to Buy and Manage a Franchise (Fireside, New York: Simon and Schuster, 1993) pp53-58</p>

REFERENCES	
CHARACTER REFERENCES (other than relatives)	
1. Name:	
Address:	
Telephone:()	
Relationship:	Years known:
2. Name:	
Address:	
Telephone:()	
Relationship:	Years known:
BUSINESS REFERENCES:	
1. Company name:	
Contact person:	
Address:	
Telephone: ()	
Relationship:	Years known:
2. Company name:	
Contact person:	
Address:	
Telephone: ()	
Relationship:	Years known:

FINANCIAL REFERENCE
Name:
Address:
Telephone:

DETAILS OF PRIMARY CHEQUE/CREDIT CARD/SAVINGS ACCOUNT				
Type of account	Bank/Institution	Account number	Date opened	Limits
Self				
1. Cheque				
2. Credit card				
3. Savings				
Spouse/Partner				
1. Cheque				
2. Credit card				
3. Savings				
CREDIT RECORD				
<p>Have either of you ever had any judgments against you (are you blacklisted)?</p> <p>Yes / No (please tick)</p> <p>If YES, specify details</p>				
<p>Have either of you ever been sequestered?</p> <p>Yes / No (please tick)</p> <p>If YES, specify details</p>				
			Date	
<p>If YES, have you been rehabilitated?</p>				
			Date	
<p>Have either of you ever been found guilty of a criminal offence?</p> <p>Yes / No (please tick)</p> <p>If YES, specify details</p>				

STATEMENT OF ASSETS AND LIABILITIES (complete only if applying for a loan)						
ASSETS (Amount in Rand)						
1.Fixed property registered in your name						
City and Town property					Owner's evaluation Bank use	
Erf No	City/ Township	Purchase price	Date purchased	Fire Insurance		
Farm and Smallholdings Property					Owner's valuation Bank use	
Erf no/name of farm	City/ Township	Purchase price	Date purchased	Fire insurance		
Property bought under deed of sale						
Erf no/ Name of farm	City/ Township	Purchase price				
2. Mortgage Bonds in own favor, i.e. where a bond is held over the fixed property of another person. State first of subsequent bond(s) and give a description of property. State the amount outstanding still receivable/ Timeshare.						
3. Stock (specify)						
4. Vehicles (state the make and year)						
5. Miscellaneous movable property (specify)						
6. Debtors						

7. Shares/Loans (specify)					
Listed on the JSE					
8. Other investments and assets (specify)					
9. Life policies (surrender values, if known)					
Insurance Company	Policy number	Life cover	Ceded to	Surrender value	
10. Credit balances (e.g. savings accounts, fixed deposits, etc.)					
TOTAL ASSETS					

LIABILITIES (amounts in Rand) (complete only if applying for a loan)									
Liabilities stated as on	D	D	M	M	C	C	Y	Y	
1. Mortgage bonds (amounts due under deed of sale)									
Erf no/ name of farm	Town/ City	Bondholder/Seller			Interest rate	Installment	Expiry date		
							Subtotal		
2. Term loans/personal loans (specify)									
3. Owing under installment sale agreements									
Type of asset e.g. vehicle, machinery, etc.					At which institution		Installments monthly		
4. Income tax owing (state when due)									
5. Owing to banks (state names and specify liabilities)									
6. Owing in respect of credit cards (specify)									

7. Other liabilities (describe and mention terms and conditions of repayment)					R
TOTAL LIABILITIES					
ASSETS LESS LIABILITIES					
SURPLUS OF ASSETS OVER LIABILITIES					
NOTARIAL BONDS (state over which assets and in favor of whom)					
CONTINGENT LIABILITY(complete only if applying for a loan)					
1. Leases					
Item	Financed by		Outstanding amount	Installment	Date payable
Suretyship					
In favor of		At financial Institution		Details of security provided	Amount
Monthly income		Self	Other	Monthly household expenditure	
Gross salary		R	R	Bond repayment / Rent R	
Housing subsidy		R	R	HP/Loan/Credit card R	
Car allowance		R	R	Insurance (life and short term R	
Commission		R	R	Domestic (water, lights, rates, levies) R	
Overtime		R	R	School and university fees R	
Other (specify)		R	R	Transport R	
Other (specify)		R	R	Maintenance (if divorced) R	
Other (specify)		R	R	Subtotal (fixed expenses) R	
Other (specify)		R	R	Other (specify)	R
Other (specify)		R	R	Other (specify)	R
Other (specify)		R	R	Other (specify)	R
TOTAL INCOME		R	R	Other (specify)	R
Less: Pension/ Medical aid/ PAYE		R	R	Other (specify)	R
NET INCOME		R	R	TOTAL EXPENSES R	

ACKNOWLEDGEMENT AND CONSENT BY APPLICANT (complete only if applying for a loan)

(This consent is required in terms of the **Code of Banking Practice** relating to obtaining written consent for verification of information provided for during the lending assessment process.)

I hereby irrevocably:

authorize the **financial institution** selected by Excell Catering Equipment to contact any of the references (including but not limited to banks or auditors), mentioned in this application form and to obtain any additional information which the **financial institution**, in its sole discretion, may deem necessary; and

Authorize the **financial institution** to cross refer any documents or information regarding my personal, business or financial affairs to one another, in as far as it may be necessary for either of them to comply with their agreement.

I hereby declare that the information provided in this application form is to the best of my knowledge true, correct and accurate in all material respects.

I acknowledge that failure to disclose any information that is relevant to this application, or the furnishing/provision of untrue, incorrect or inaccurate information will render this application or any agreement or subsequent agreement entered into between the **franchisor** and myself (either personally or on behalf of any company) or myself and the **financial institution**, null and void.

I herewith declare that the amount as stated in the application as own contribution has not been borrowed from any source where it is repayable in the future or where it may cause any financial liability to the business.

I further acknowledge that this application does not constitute any form of agreement or contract whatsoever between the **franchisor**, the **financial institution** and myself, and is no way binding on either party. However, if any finance is granted to me as a result of this application, the information contained herein will work throughout the duration thereof and form the basis for such financing.

I acknowledge that if finance is approved by the **financial institution** in addition to this application form, I will be required to complete and sign documentation to be used by the **financial institution**, and to pay the costs involved, where applicable, which I agree to do on request.

I authorize the **financial institution** to disclose full particulars regarding the approval of my application to Excell Catering Equipment.

Signed at _____ on _____

APPLICANT/S _____ WITNESSES: _____

Credit Check Application Form

I, the undersigned, acknowledge that Excell Catering Equipment, any of its agents, financial institution or credit bureau may conduct a credit check and exchange of such information on myself for purposes of assessing me as a potential Excell Catering Equipment franchisee.

Name: _____

ID Number: _____

Date: _____

Signed: _____

Name: _____

ID Number: _____

Date: _____

Signed: _____

Bank: _____

Branch Code: _____

Name of Account Holder: _____

Account Number: _____

Phone Number of Branch: _____

Please email: sean@excellcatering.co.za

Thank you for your interest in the Excell Catering Equipment franchise opportunity.