

**SUBMISSION OVERVIEW TEMPLATE  
FOR INFORMATIONAL PURPOSES ONLY**

**DATE**

**PRINCIPAL(S)**

Name (husband and wife or individual)  
Street address  
City, State Zip Code  
Phone Number  
Cell Number

Present Occupation:  
Current Yearly Income:  
Credit Score (if known):

**PRINCIPAL #2 (if joint partnership)**

Name (husband and wife or individual)  
Street address  
City, State Zip Code  
Phone Number  
Cell Number

Present Occupation:  
Current Yearly Income:  
Credit Score (if known):

**FRANCHISE DESCRIPTION**

***[Franchise Name]***

***[Brief description of business]*** delivers compassionate skilled medical and non-medical home care to clients by a trained and dedicated staff. Technicians provide for the safety and security of clients, regardless of age, by offering personalized care and home support services, as well as harmonious companionship. ***[example only – please complete]***

Proposed location:

**Total amount of financing sought:**           \$  
**Total amount of personal contribution:**       \$  
**Total cost of Franchise Development:**       \$

## **PROPOSED USE OF FUNDS**

### ***[Add items as necessary]***

Franchise Fee:	\$
Training Expenses (including travel):	\$
Leasehold Improvements (if any):	\$
Fixtures, Furnishings and Equipment (FFE):	\$
Lease Pre-Payments:	\$
Advertising & Web:	\$
Inventory:	\$
Office Supplies:	\$
Telephone & Utility Deposits:	\$
Organizational & Legal Fees:	\$
Insurance:	\$
Work Force Hiring & Salaries:	\$
Working Capital:	\$
Miscellaneous (provide itemization)	\$
<b>TOTAL EXPENSES:</b>	<b>\$</b>

## **TIMEFRAME & CORPORATE STRUCTURE**

### ***[Brief description]***

The partners have already formed the corporation under the name XYZ Partners Limited, a Delaware C-Corp under Corporate #xxxxxx. We anticipate signing the franchise agreement on \_\_\_\_\_ and will enter the lease on \_\_\_\_\_. To date, the partners have invested personal funds totaling \$ \_\_\_\_\_. ***[example only – please complete]***

## **DISCLOSURES / EXPLANATIONS (PERTAINING TO FINANCING)**

Credit score of Principal #2 adversely impacted by divorce. ***[example only – please complete, if applicable]***

## **CREDIT SCORES**

You must supply a copy of your credit report containing your 3 credit scores. We recommend that you obtain your combined report by creating an account at [www.creditchecktotal.com](http://www.creditchecktotal.com). You will be able to access your Experian, Equifax and TransUnion scores through this one portal.

CreditCheckTotal offers a free 30 day trial. You must obtain, download and email to us your most recent report in PDF format. Simply follow the instructions to obtain your PFD report.

**Read the instructions carefully.** You may wish to immediately cancel your account to avoid continuing charges after the initial free trial period. We are not responsible for any charges you may occur. We are in no way affiliated with CreditCheckTotal. While we recommend that you obtain your PDF credit report from [www.creditchecktotal.com](http://www.creditchecktotal.com) it is for ease of use only. We will accept any report so long as in PDF format and contains results from Experian, Equifax and TransUnion.

Please return this completed form along with your credit score report. The credit score report must contain results from all 3 major credit agencies and be in PDF format.

We will immediately review and contact you with a financing option usually within 24 hours.

Please return to:

Don Johnson  
Diamond Financial  
(877) 508-2274  
[don@DiamondFS.com](mailto:don@DiamondFS.com)

