

# Umi Sushi Express

## Confidential Qualification Report

Thank you for your initial inquiry about our franchise opportunity. The information you provide to us will assist in determining if you qualify to become a franchisee of UMI Sushi Express. All information will be held in strict confidence. The completion of this form will not obligate you, your co-applicant or UMI Sushi Express, Inc. in any manner.

### PERSONAL FACTORS:

Applicant Name \_\_\_\_\_

Home Address \_\_\_\_\_

City \_\_\_\_\_ State/Province \_\_\_\_\_ Zip/Postal Code \_\_\_\_\_

Home Phone (\_\_\_\_\_) \_\_\_\_\_ Business Phone (\_\_\_\_\_) \_\_\_\_\_

### CO-APPLICANT FACTORS: (Complete only if a co-applicant)

Applicant Name \_\_\_\_\_

Home Address \_\_\_\_\_

City \_\_\_\_\_ State/Province \_\_\_\_\_ Zip/Postal Code \_\_\_\_\_

Home Phone (\_\_\_\_\_) \_\_\_\_\_ Business Phone (\_\_\_\_\_) \_\_\_\_\_

### PERSONAL REFERENCES:

Personal Bank \_\_\_\_\_ Contact \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State/Province \_\_\_\_\_ Zip/Postal Code \_\_\_\_\_

Business Bank \_\_\_\_\_ Contact \_\_\_\_\_

Address \_\_\_\_\_

Individual \_\_\_\_\_ Phone (\_\_\_\_\_) \_\_\_\_\_

Address \_\_\_\_\_

Individual \_\_\_\_\_ Phone (\_\_\_\_\_) \_\_\_\_\_

Address \_\_\_\_\_

### APPLICANTS BUSINESS EXPERIENCE:

Dates: From-To	Company	Position	Annual Income

Please attach resume if available.

**APPLICANTS FINANCIAL STATEMENTS:**

Assets	S	Liabilities	S
Cash in Bank Accounts		Notes Payable - car loans	
Liquid Assets, stocks, bonds		Notes Payable - other	
RRSP's / 401 K		Average Credit Card Balance	
Real Estate - Home		Mortgage on Home	
Real Estate - Other		Mortgages on Other Real Estate	
Other Assets, explain		Other Liabilities	
Total Assets		Total Liabilities	

Net Worth (Assets – Liabilities) \$ \_\_\_\_\_

**CO-APPLICANTS FINANCIAL STATEMENTS: (if applicable)**

Assets	S	Liabilities	S
Cash in Bank Accounts		Notes Payable - car loans	
Liquid Assets, stocks, bonds		Notes Payable - other	
RRSP's / 401 K		Average Credit Card Balance	
Real Estate - Home		Mortgage on Home	
Real Estate - Other		Mortgages on Other Real Estate	
Other Assets, explain		Other Liabilities	
Total Assets		Total Liabilities	

Net Worth (Assets – Liabilities) \$ \_\_\_\_\_

**GENERAL INFORMATION:**

Who will operate the restaurant?  Self  Other

Where would you like to locate UMI Sushi Express?

First Choice \_\_\_\_\_ Second Choice \_\_\_\_\_

Where are the funds going to come from to meet the requirements of the estimated start up costs?

Enter source and amounts: \_\_\_\_\_

Have you ever failed in a business, filed for bankruptcy or had pending or threatened lawsuits against you?

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

The undersigned certifies that the information contained in this Confidential Qualification Report is accurate and complete to the best of their knowledge. I hereby authorize UMI Sushi Express, Inc. or its authorized agent to verify any of the above information. It is understood that the purpose of this evaluation report is to assess the viability of the applicant as an UMI Sushi Express franchisee.

Applicant Signature \_\_\_\_\_ Date \_\_\_\_\_