



PERSONAL FINANCIAL STATEMENT

I make the following statement of all my assets and liabilities as of the ____ day of _____.

ASSETS

(a) Cash on hand and unrestricted in banks <i>Do not include IRAs and pension plans</i>	\$
(b) Publicly Traded Stocks, Bonds and Government Securities	\$
(c) Total Liquid Assets <i>Add (a) + (b)</i>	\$
(d) Personal Residence <i>Estimated fair market value</i>	\$
(e) Other Real Estate <i>Estimate fair market value</i>	\$
(f) Personal Possessions <i>Household furniture, automobiles, etc.</i>	\$
(g) Other Assets <i>Include IRAs, pension plans, notes receivable, etc.</i>	\$
(h) Total Assets <i>Add (c) + (d) + (e) + (f) + (g)</i>	\$

LIABILITIES AND NET WORTH

(i) Notes Payable, Unsecured	\$
(j) Notes Payable, Secured	\$
(k) Mortgages Payable on Personal Residence and Other Real Estate	\$
(l) Other Liabilities	\$
(m) Total Liabilities	\$
NET WORTH <i>Total Assets (h) minus Total Liabilities (m)</i>	\$

CONTINGENT LIABILITIES

Please list the nature and amount of any contingent liabilities (as an endorser or co-maker, on leases or contracts, legal claims, or provisions for federal income taxes).

The undersigned certifies that the information furnished in this application is true, correct and complete.

Print Name:

Signature:

Dated this:

Day of:



I am completing this form with the understanding that it puts me under no obligation, but allows _____ and Jupiter Security Consultants, Inc. to make an initial evaluation of my candidacy as a prospective TaxCafeOnline branch office. Upon evaluation of this application, _____ and Jupiter Security Consultants, Inc. may provide additional information to qualified candidates.

I understand that the information I am receiving from Jupiter Security Consultants, Inc., or from any TaxCafeOnline employee, agent, or branch is highly confidential and is being made available to me because of this application, and I will hold it in the strictest confidence.

Date: _____ Signature: _____

INSTRUCTIONS

Please type or print clearly. Please fully answer **all** questions. Return original copy in the envelope provided. If spouse or any other individual will be a co-owner, please make a complete copy of this form and fill out a separate application.

INFORMATION ABOUT YOURSELF

Name:

Current Home Address:

City:State:Zip code:

Residence Telephone: () - Best Time to Call: AM PM

Work Telephone: () - Best Time to Call: AM PM

Mobile Telephone: () -

Email Address:Date of Birth:

Marital Status: Single Married Divorced

Number of Dependents:Age of Dependents:

Residence: Own Rent Other

Length of Time at Current Residence?

Spouse's Name:Occupation:

FOR OFFICE USE ONLY

Date Received

Reviewed by (please initial)

1. H D

2. Circle all that apply:
A B C D

- 1.Are you a citizen of the United States?
☐ Yes ☐ No

If you are not a citizen of the United States, are you legally qualified to work in the United States?
☐ Yes ☐ No
2. Have you ever been convicted of a felony or misdemeanor or are such charges pending, being appealed, or are you under indictment? (Do not include traffic violations.)
☐ Yes ☐ No
3. Have you ever been adjudicated bankrupt?
☐ Yes ☐ No
- If yes to questions 2 and/or 3 above, please state details on a separate sheet.

EDUCATIONAL BACKGROUND

You

Highest Level Completed:91011121314151616+

Highest Degree Earned:HSBA/BSMA/MSPh.D.CPA

Major Field of Study:

Name of College/University:

Your spouse

91011121314151616+

HSBA/BSMA/MSPh.D.CPA



BUSINESS INFORMATION

Present/Most Recent Employment:

Self-Employed: ☐ Yes ☐ No

Name of Employer: Title:

Address:

Employed From: To: Annual Salary: \$

Telephone: () -

May you be contacted at work? ☐ Yes ☐ No Best Time to Call: AM PM

Please attach a resume of your previous work experience.

Have you ever operated a business? ☐ Yes ☐ No A branch? ☐ Yes ☐ No

GENERAL INFORMATION

How did you first learn about this branch office opportunity?

Have you visited/know any of our other branch office or know any TaxCafeOnline employees? ☐ Yes ☐ No

If yes, which ones?

Is there any other information you would like to provide us? Use additional sheet.

FINANCIAL OVERVIEW

Current Annual Household Income: \$

1. What type of financing is available to you? ☐ Personal Assets ☐ Friendly Loan (Family) ☐ Private Investors ☐ SBA or Provincial Loan ☐ Secured Bank Loan ☐ Unsecured Bank Loan

2. What is the minimum gross income you would need for personal expenses during your first 12 to 18 months of operating your branch? \$_____

3. What amount of liquid cash do you have available to invest in a branch opportunity? \$_____

4. What amount of financing do you have available to you? \$ _____

5. What would your branch gross revenue goals be?
Year 1 \$ _____ Year 2 \$ _____ Year 3 \$ _____ Year 4 \$ _____ Year 5 \$ _____

6. What would your income goals (owners salary) be?
Year 1 \$ _____ Year 2 \$ _____ Year 3 \$ _____ Year 4 \$ _____ Year 5 \$ _____



OPERATIONAL APPROACH

1. If qualified, when would you be ready to purchase the branch? ☐ 0-30 days ☐ 30-90 days ☐ 90-180 days ☐ 180+ days

2. Would you expect to devote your full-time attention to this business? ☐ Yes ☐ No

3. Will you be responsible for the day-to-day operation of the business? ☐ Yes ☐ No

4. Would your spouse assist you in the business? ☐ Yes ☐ No

5. Where would you like to locate your branch? (Include city and state or zipcode.)

1st choice _____ 2nd choice _____ 3rd choice _____

MOTIVATION FOR OWNING A BRANCH OFFICE

1. What aspects of owning your own business appeal to you?

2. What abilities, particularly in business services, management, operations, customer service, sales and marketing do you have that would enhance your ability to build a successful business?

PERSONAL CONSIDERATIONS

1. Are you physically and mentally capable of working 6 days per week, 8 hours per day until you have developed satisfactory staff support? ☐ Yes ☐ No

2. Do you have the ability and desire to devote 8 hours a day to talking about the business services and products you would be offering to your potential clients? ☐ Yes ☐ No

3. How long have you used a computer? _____ years

4. You may find it extremely beneficial to your business for you to speak to various groups and clubs. Do you have the ability and desire to speak in front of large groups? ☐ Yes ☐ No

5. Are your family members aware of the changes required to start a new business? If yes, how will you manage the responsibilities of family and business? ☐ Yes ☐ No