



Prospective Client Profile

PROSPECTIVE CLIENT PROFILE

Thank you for your interest in **The Ampersand Group**.

This profile will allow us to determine your business objectives and goals.

All information is strictly confidential and does not obligate you or **The Ampersand Group**.

Please complete and either email (bpenn@TheAmpersandGroup.com) or Fax: 330-379-0078 your client profile to us.


PERSONAL PROFILE

Last Name		First Name		Middle	<input type="checkbox"/> Male <input type="checkbox"/> Female	U.S. Citizen? Yes <input type="checkbox"/> No <input type="checkbox"/>
Home Street Address					How many years at this address?	
City		State		Zip	Birthdate	
Home Phone Number	Cell Phone Number		Best time to call		Own/Buying <input type="checkbox"/> Renting <input type="checkbox"/>	Social Security Number
Marital Status		Spouses Name		Spouses Birthdate		U.S. Citizen? Yes <input type="checkbox"/> No <input type="checkbox"/>
Child's Name		Age		Child's Name		Age
Child's Name		Age		Child's Name		Age
How did you hear about us?				Magazine and Trade Journals you read.		
Affiliations (Business, Civic fraternal)						
Hobbies, Activities, Interests?						

BUSINESS DESCRIPTION – Base information on your current position

Name of Business/Current Employer			Title	Date Started
Street Address			Description of business/position	
City	State	Zip	E-mail Address	
Business Phone	Business Fax		May we call you at work? Yes <input type="checkbox"/> No <input type="checkbox"/>	
What equipment/Software do you use in your current job?				
In handling the day-to-day operations of your business, which activities do you least like? Most?				
Least:				
Most:				
Why are you considering The Ampersand Group?				
What are your concerns with The Ampersand Group?				
FINANCIAL		Previous Year		Current Year To Date
Sales	Gross Profit	Net Income		Sales
				Gross Profit
				Net Income
Current Inventory Bill As Ship			Average Order Size (Sell) \$	
Brief Description of Product Mix				
Product Line	%	\$/Yr.	Brief Description of Industry Mix	
Business Forms	_____	_____		
Commercial Printing	_____	_____		
Promotional Products	_____	_____		
Office Supplies	_____	_____		
Other _____	_____	_____		

If you do not currently own your own business. Please complete the following section

Have you ever been self-employed? <input type="checkbox"/> Yes <input type="checkbox"/> No		Have you ever signed a non-compete that may limit your owning your own Distributorship? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Income from present occupation? \$ _____ per year		Spouse/Other Income \$ _____ per year		Minimum monthly expenses? \$ _____
Would your business be your sole source of income? <input type="checkbox"/> Yes <input type="checkbox"/> No		If No, Explain		
Own Home or Rent? <input type="checkbox"/> Own <input type="checkbox"/> Rent		Current Value? \$ _____		
Total Assets? \$ _____		Total Liabilities? \$ _____		Total Net Worth? \$ _____
Location Preferences				
Do you intend to run this business yourself? <input type="checkbox"/> Yes <input type="checkbox"/> No				
If not, who will be responsible for the daily operation of your business?				
Do you have any contingent liabilities for guarantees, endorsements, leases, etc.? <input type="checkbox"/> Yes <input type="checkbox"/> No		Have you or any company you have owned or managed gone through bankruptcy or compromised a debt? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Are you now, or have you ever been party to any lawsuit - either as a defendant or plaintiff? <input type="checkbox"/> Yes <input type="checkbox"/> No		Have you ever been convicted of any offense (including misdemeanors for which you were fined \$200 or more) <input type="checkbox"/> Yes <input type="checkbox"/> No		
What are your annual income goals?	In 3 years	In 5 years	In 10 years	How many hours per week will you give to your business to reach your goals?
I agree to allow The Ampersand Group Inc., to check personal credit history and background				
_____		_____		
Signature		Date		
Please complete and either email (bpenn@TheAmpersandGroup.com) or Fax: 330-379-0078 to us.				
<p>The Ampersand Group 1946 South Arlington Street Akron, Ohio 44306 Phone 330-379-0044 / Fax: 330-379-0078</p>				
 The Ampersand Group <small>LLC.</small> Supporting Independent Distributors Worldwide				