

12 STEP PROCESS TO INVESTING IN A FRANCHISE

A VISA FRANCHISE GUIDE

Overview



At Visa Franchise, our focus is on assisting clients in identifying and evaluating the optimal franchise investments tailored to their unique profiles and family needs. We specialize in guiding foreign nationals towards franchise investments that meet the criteria for an E-2 or EB-5 investor visa. While our research and analysis service plays a crucial role in finding the right franchise, we also recognize the importance of ensuring our clients understand the entire process of becoming a franchisee.

Therefore, we have outlined the typical 12-step process involved in the franchise review journey in the following pages. This framework aims to empower individual investors to make well-informed and educated investment decisions. It's important to note that while not every franchise follows the exact same steps and order, most franchises have a process that closely resembles this outline. Understanding that the entire process can span from 4 to 12 months provides valuable context for our clients.





12 Steps



- 1 Initial discovery/solution call
- 2 Become a Visa Franchise client
- 3 Client Profile Survey
- 4 Onboarding Call
- 5 Franchise and business analysis
- 6 Introduction to current franchisees
- 7 Introduction to franchisors
- 8 Due diligence process
- 9 Open a corporate bank account
- 10 Investment decision
- 11 Document collection and business plan preparation
- 12 Development of business

1. Initial discovery / solution call

30 Minutes

- Free Initial video call to learn more about Visa Franchise's services
- Understand important factors of your case to see if we are best positioned to support your immigration investment goals



2. Become a Visa Franchise client

30 Minutes

Initial Fee (\$675 - \$1,100)

- Review our services agreement for e-signature
- Hire Visa Franchise for our LLC and Corporate Bank Account formation services
- Send proof of payment (Preferred payment is through a HubSpot link)

3. Client Profile Survey

30 Minutes

- Complete our client questionnaire
- Serves as the base to identify the best business opportunities for your unique profile

4. Onboarding Call

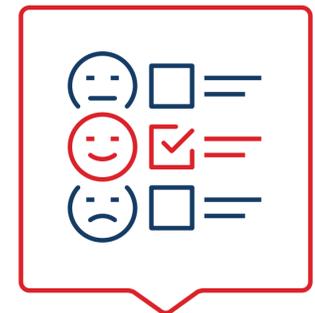
30 Minutes

- Schedule video call to review any remaining questions
- Understand your unique profile before the research and analysis begins

5. Franchise and business analysis

3 to 5 business days

- Our team reaches out to businesses that best fit your profile
- Complete the research, analysis and due diligence
- Share analysis for each different business opportunity



6. Debrief call

1 Week

- Schedule a call or meeting to discuss any feedback regarding the businesses
- Review clarifying questions you might have about the businesses before deciding which ones to speak with
- Share analysis for each different business opportunity

7. Introduction to franchisors

1 to 2 Weeks

- Arrange an introductory call with the businesses to see if there is a mutual initial fit
- The business will then take the lead in providing relevant information for your further review



8. Due diligence process

1 to 2 Weeks

- Immigration attorney to review the business(s) of choice and advise the clients on how to best structure the investment for E-2 visa eligibility.
- During this stage of the process, form your LLC, apply for the EIN, and consider the associated costs.
- Client manager to coordinate calls with existing franchisees/investors of the chosen business.

- Meet in-person or attend a virtual discovery day with the business.

- Franchise attorney to review the franchise's FDD as well as the franchise agreement and provide clients with legal advice.

9. Open a corporate bank account

1 week

- Once your LLC has been formed and EIN issued, you can now proceed with opening your corporate bank account

10. Investment decision

2 to 3 weeks

- Agreement is signed with the chosen business
- Initial franchise fee (or deposit) is paid

11. Document collection and business plan preparation

2 to 3 weeks

- Our experience teams work avidly to intricately develop a comprehensive business plan tailored specifically for your immigration journey.

- Additionally, we provide assistance in gathering and thoroughly reviewing all the necessary documents for your petition, ensuring a thorough and well-prepared application process.

12. Development of business

2 to 8 Weeks

- From this point forward the franchisor & lawyer(s) is best suited to help with opening up the business and providing ongoing support as needed

Final thoughts



The knowledge and support that an individual gains from investing in a franchise is extremely valuable, especially for individual investors entering a new industry or foreign nationals moving to the U.S. In terms of timing, **the process up to signing the franchise agreement can take anywhere from one month to three months or longer**, depending on how quickly the individual decides to move forward in the process. From the time the franchise agreement is signed, **the training and development phase can take anywhere from three to nine months**, depending on the type of franchise. At Visa Franchise, we're dedicated to offering our services and industry expertise to streamline the process for individuals and their families who are considering franchise investments. We eagerly anticipate the opportunity to support you in any way possible throughout this journey. Best of luck as you embark on this exciting venture!

**IF YOU HAVE ADDITIONAL QUESTIONS,
FEEL FREE TO CONTACT YOUR CLIENT SERVICES ASSOCIATE!**