

**Lee's**  
**Hoagie House**  
A Philadelphia Tradition since 1953

**BIOGRAPHICAL AND FINANCIAL  
QUESTIONNAIRE**

## CONFIDENTIAL

The completion of this Questionnaire does not obligate either party in any manner.

### PERSONAL INFORMATION

Date \_\_\_\_\_ Home Phone \_\_\_\_\_

Name \_\_\_\_\_ Business Phone \_\_\_\_\_

Address \_\_\_\_\_ Rent \_\_\_\_\_ Own \_\_\_\_\_

City, State \_\_\_\_\_ Zip \_\_\_\_\_ How Long? \_\_\_\_\_

May we contact you at Home \_\_\_\_\_ Work \_\_\_\_\_

Social Security Number \_\_\_\_\_ Date of Birth \_\_\_\_\_

Marital Status \_\_\_\_\_ Spouse's Name \_\_\_\_\_

### EDUCATION

Highest Grade Completed \_\_\_\_\_

If College Graduate, Name of School \_\_\_\_\_ Year Graduated \_\_\_\_\_ Degree \_\_\_\_\_

Please describe any training in retailing, sales or management \_\_\_\_\_

### BUSINESS EXPERIENCE

Present Occupation \_\_\_\_\_ Position \_\_\_\_\_

Company \_\_\_\_\_ Address \_\_\_\_\_

Dates Employed \_\_\_\_\_ Describe duties: \_\_\_\_\_

#### Previous Business Experience *(most recent first)*

Dates Employed \_\_\_\_\_ Company \_\_\_\_\_

Position \_\_\_\_\_ Company Address \_\_\_\_\_

Reason for leaving \_\_\_\_\_

Dates Employed \_\_\_\_\_ Company \_\_\_\_\_

Position \_\_\_\_\_ Company Address \_\_\_\_\_

Reason for leaving \_\_\_\_\_

Dates Employed \_\_\_\_\_ Company \_\_\_\_\_

Position \_\_\_\_\_ Company Address \_\_\_\_\_

Reason for leaving \_\_\_\_\_

Have you ever been self-employed? \_\_\_\_\_

If yes, give details \_\_\_\_\_

Have you ever had a business failure? \_\_\_\_\_

If yes, give details \_\_\_\_\_

**REFERENCES**

**Bank References**

Name \_\_\_\_\_ Address \_\_\_\_\_ Acct. # \_\_\_\_\_ Checking \_\_\_\_\_  
Savings \_\_\_\_\_  
Name \_\_\_\_\_ Address \_\_\_\_\_ Acct. # \_\_\_\_\_ Checking \_\_\_\_\_  
Savings \_\_\_\_\_

**BUSINESS REFERENCES**

Name \_\_\_\_\_ Address \_\_\_\_\_  
Occupation \_\_\_\_\_ Phone \_\_\_\_\_ Years Known \_\_\_\_\_  
Name \_\_\_\_\_ Address \_\_\_\_\_  
Occupation \_\_\_\_\_ Phone \_\_\_\_\_ Years Known \_\_\_\_\_

**FINANCIAL INFORMATION**

**INCOME**

Your Current Annual Salary \_\_\_\_\_ Bonus/Commissions \_\_\_\_\_  
Your Spouse's Current Annual Salary \_\_\_\_\_ Bonus/Commissions \_\_\_\_\_  
Interest \_\_\_\_\_  
Dividends \_\_\_\_\_  
Other Income \_\_\_\_\_

**Current Assets**

Cash on hand and in bank	\$ _____
Vested retirement	_____
Securities	_____
Notes receivable	_____
Life insurance (cash surrender value)	_____
Stocks/bonds	_____
Real estate	_____
Personal property	_____
Other	_____
<b>TOTAL ASSETS</b>	<b>\$ _____</b>

**Liabilities and Net Worth**

Notes/bank loans \$ \_\_\_\_\_  
Notes/other than banks \_\_\_\_\_  
Accounts/bills due \_\_\_\_\_  
Real estate mortgages \_\_\_\_\_  
Other debts/obligations \_\_\_\_\_  
TOTAL LIABILITIES \$ \_\_\_\_\_  
  
Total Assets – Total Liabilities = NET WORTH \$ \_\_\_\_\_

**GENERAL INFORMATION**

List hobbies, community involvement, specific interests \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Will you devote full time to this business? \_\_\_\_\_ If not, please explain \_\_\_\_\_  
\_\_\_\_\_

When will you be available to open business? \_\_\_\_\_

What geographical area are you interested in? \_\_\_\_\_

Have you ever owned a franchise? \_\_\_\_\_ If yes, give details \_\_\_\_\_  
\_\_\_\_\_

Will your license be a(n) Individual \_\_\_\_\_ Partnership \_\_\_\_\_ Corporation \_\_\_\_\_

The undersigned certifies that the information provided on the above financial statement is true and correct.

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

Spouse's signature \_\_\_\_\_ Date \_\_\_\_\_