



# HALLMARK

## HOME CARE

*A Referral Agency*

Intro Presentation



*The ONLY homecare referral agency  
in franchising!*



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# Hallmark Homecare Discovery Process



**FRANCHISE VALIDATION & LEADERSHIP CALLS**  
Invitations to weekly Franchise Validation & Leadership Calls



WEEKS 5-6

7

## WELCOME CALL

Celebrate & discuss first steps as a Franchisee

6

## FRANCHISE AGREEMENT DELIVERY

Personalized franchise agreements delivered & signed, fees transferred

5

## CONFIRMATION DAY

Meet the Zor team, brand approvals, decision day call

4

## TERRITORY MAPPING & CONFIRMATION DAY INVITATION

Territory analysis, C-Day invitation, C-Day preparation call

3

## FDD REVIEW & Q&A

FDD signed, item review, questions answered

2

## UNIT ECONOMICS

Startup & operating expenses, reported earnings, send FDD

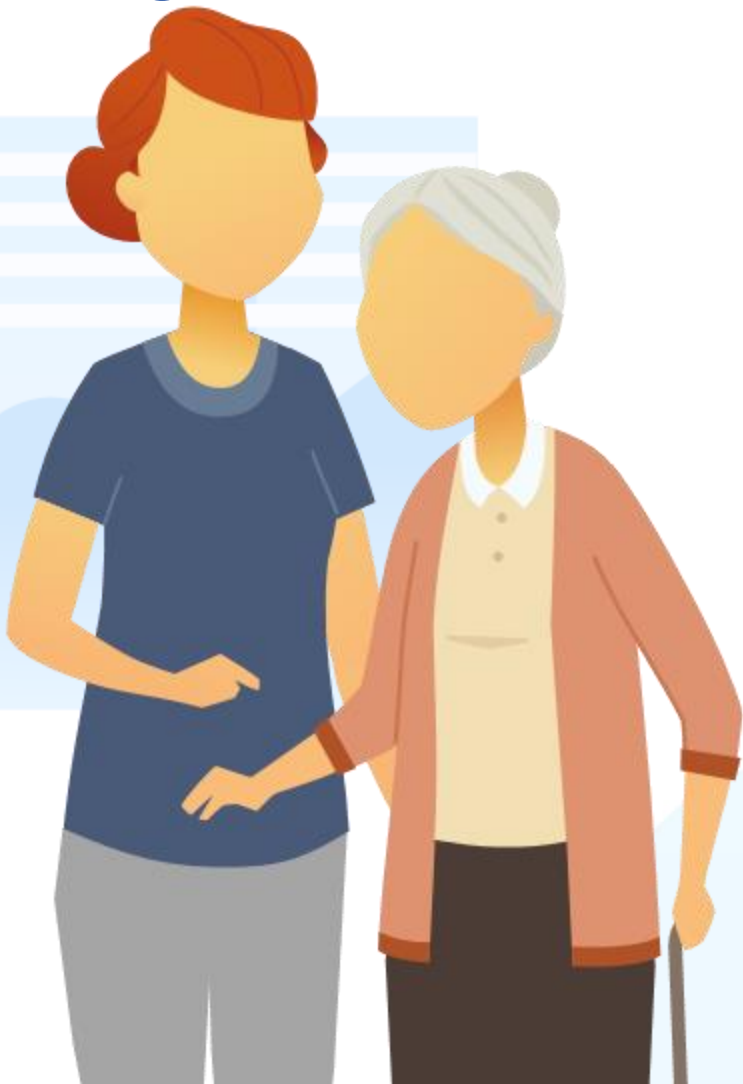
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## INTRODUCTORY CALL

Brand history—what makes us unique

WEEKS 1-2

# Agenda



## ♥ Caregiver Recruiters & Client Matchmakers

We search, recruit, vet, and place Caregivers in the homes of our clients on a direct-hire basis

Save Money – Better Care – More Control

## ♥ Revolutionizing Homecare!

What We Do: Caregiver Search – Recruitment - Placement

Solving the chronic caregiver shortage, high costs and other challenges that the traditional homecare model faces today

## ♥ H-A-L-L-M-A-R-K

- Ⓜ Hallmark Differentiators
- Ⓐ A Growing Industry Ripe for Disruption
- Ⓛ Leadership with Experience
- Ⓛ Low-Cost & Simple Franchise Model
- Ⓜ Meaningful Work
- Ⓐ A Strong Support System
- Ⓡ Ramp-up Quickly
- Ⓚ Key Takeaways

## ♥ Franchise FastLane Driving Development

Seeking Candidates that have the desire to “make a difference” and enjoy business development

## ♥ We make it a “Win – Win – Win”

For Caregivers, Clients, and Franchisees

# The Hallmark Homecare Story

- ♥ Steve Everhart founded **The Senior's Choice** (the traditional homecare agency model) in 1999 and grew it to over 700 agencies.
- ♥ He experienced first-hand the challenges that traditional senior care businesses faced and set out on a journey to solve the problem of caregiver shortages for seniors, and more!
- ♥ He founded **Hallmark Homecare** in 2013 with the mission to remedy the challenges crippling the industry by chronic caregiver shortages and increasing costs of care.
- ♥ The model provides a **WIN – WIN – WIN!** for seniors, caregivers and franchisees.

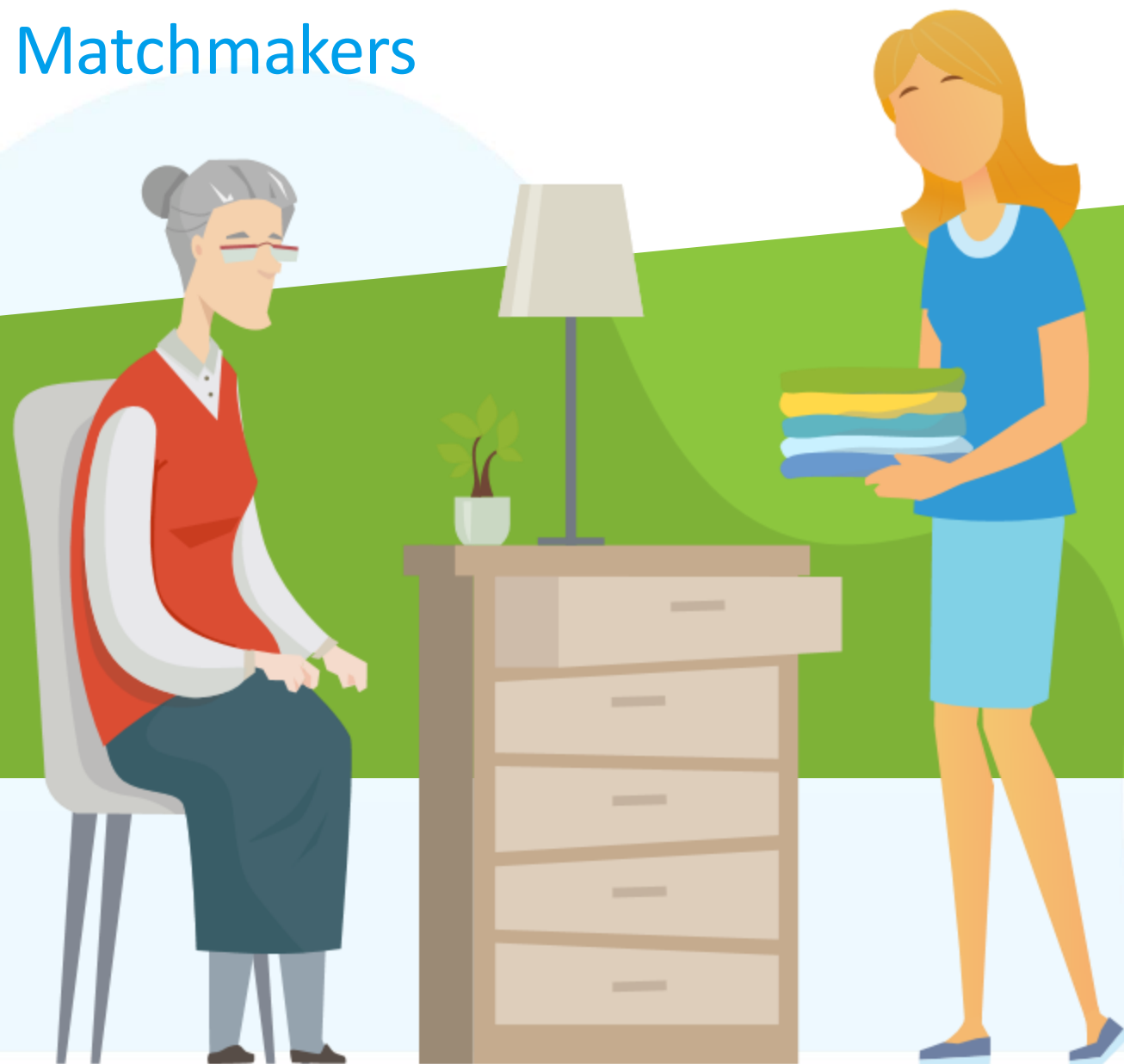




# Caregiver Recruiters & Client Matchmakers

We search, recruit, vet, and place  
Caregivers in the homes of our clients  
on a **direct-hire** basis.

CLIENTS: *SAVE MONEY.  
EXPERIENCED CAREGIVERS.  
MORE CONTROL.*



# What We Do

Caregivers provide seniors non-medical personal care with their daily living activities, to help them remain independent at home.



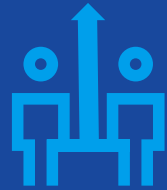
## Companionship Assistance

- ♡ Transfers
- ♡ Bathing
- ♡ Dressing
- ♡ Grooming
- ♡ Toileting
- ♡ Cooking/Eating

## Household Assistance

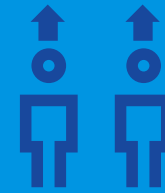
- ♡ Light Housekeeping
- ♡ Laundry
- ♡ Linens
- ♡ Errands
- ♡ Transportation
- ♡ Grocery Shopping
- ♡ Medication Reminders
- ♡ Social Activities

# Why Hallmark Homecare?



Agency Model

Employer / Employee Model

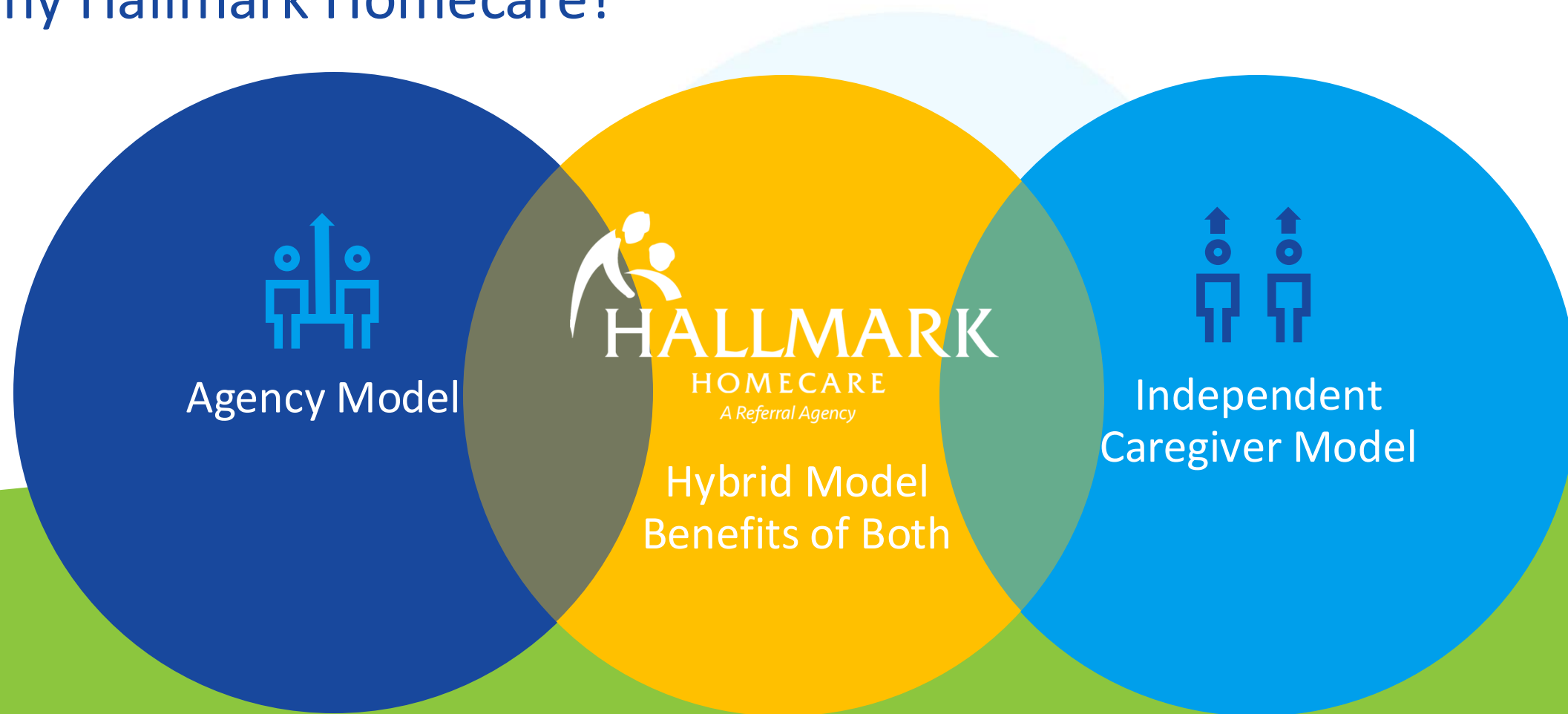


Independent  
Caregiver Model

Direct-Hire Model



# Why Hallmark Homecare?



An Alternative Solution for Better & More Affordable Homecare



# H

## Hallmark Differentiators

“

We went to meet the families and introduced our caregivers this week. Hearing their stories and knowing that we are able to help relieve the stress and anxiety on their end is so rewarding.”

– Rowena Hartman, Franchisee



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# Hallmark Solves the Challenges of a Traditional Homecare Agency

## CHALLENGE

Caregiver Recruitment & Retention

## SOLUTION

**Direct Hire Model – We cut out the middle-man. This results in higher pay and more hours for the caregiver.**

Caregivers average 40+ hours per week with 1 client at a higher pay rate compared to 3+ clients at a lower pay rate because of the agency middle-man.

## CHALLENGE

Escalating Costs & Lack of Control

## SOLUTION

**Caregivers work directly for the family. The family is in charge, not the agency.**

# Caregiver Differentiators

- ♥ Caregiver is **paid a higher wage** which improves caregiver satisfaction and retention
- ♥ More hours and more consistent, steady shifts
- ♥ Our clients average 40+ hours of care per week which is preferred by caregivers

Usually shorter commutes – aim for 10-mile radius.



# Client Differentiators

## Caregiver Pool / Supply

- ♥ Caregiver pay is \$3 - \$5 higher per hour because Hallmark cuts out the middle-man (the AGENCY)
- ♥ Higher pay means higher Caregiver quality and creates a larger pool of potential caregivers – we get the “Cream of the Crop”
- ♥ Clients save money yet caregivers get paid more
- ♥ Caregivers are insured, screened, and matched to the individual client needs



# Client Differentiators – **Hallmark Process**

**1**

Hallmark meets  
with family to  
understand needs



**2**

Hallmark refers qualified  
candidates to the client



**3**

Caregiver  
employed by  
family

The client (ultimately) decides what happens in their home: who provides the care, what care is provided, how it's provided, and Hallmark facilitates the client/caregiver relationship as liasons.





# Client Differentiators

## Assurances, Insurances & Quality Outcomes

- ♥ Verify Caregiver credentials
- ♥ Criminal background screening
- ♥ Professional reference checks
- ♥ All necessary insurances



# Revenue Process

## Matchmaking Steps



Engagement Agreement



Hallmark finds Caregiver via Custom Search



Caregiver set up as 1099 Independent Contractor with Client

## Payment Options

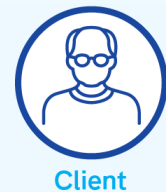
### One Time Placement Fee to Hallmark

- Client manages Caregiver scheduling
- Client pays the Caregiver directly
- Client handles replacement if Caregiver calls out
- Client generates annual 1099 for the Caregiver
- Hallmark is not involved beyond initial placement

### Hourly Rate

- Hallmark handles ongoing administration for \$7-12/hour fee
- Caregiver Scheduling
- GPS Verified Hours via Time Clock App
- Direct deposit of wages to Caregiver
- Generates annual 1099 for the Caregiver
- Hallmark manages Caregiver replacement

## Payment Flow



\$30



\$10



Hallmark Franchisee

\$20



Caregiver

# Client Differentiators

## Continuity of Care

*Client has complete hiring & firing authority.*



# A

## A Growing Industry Ripe for Disruption

“

The caregiver's dedication to taking care of my husband has allowed me to continue to my work in our family business. Hallmark Homecare has enabled us to stay together in our home where we both want to be.”

— Carol



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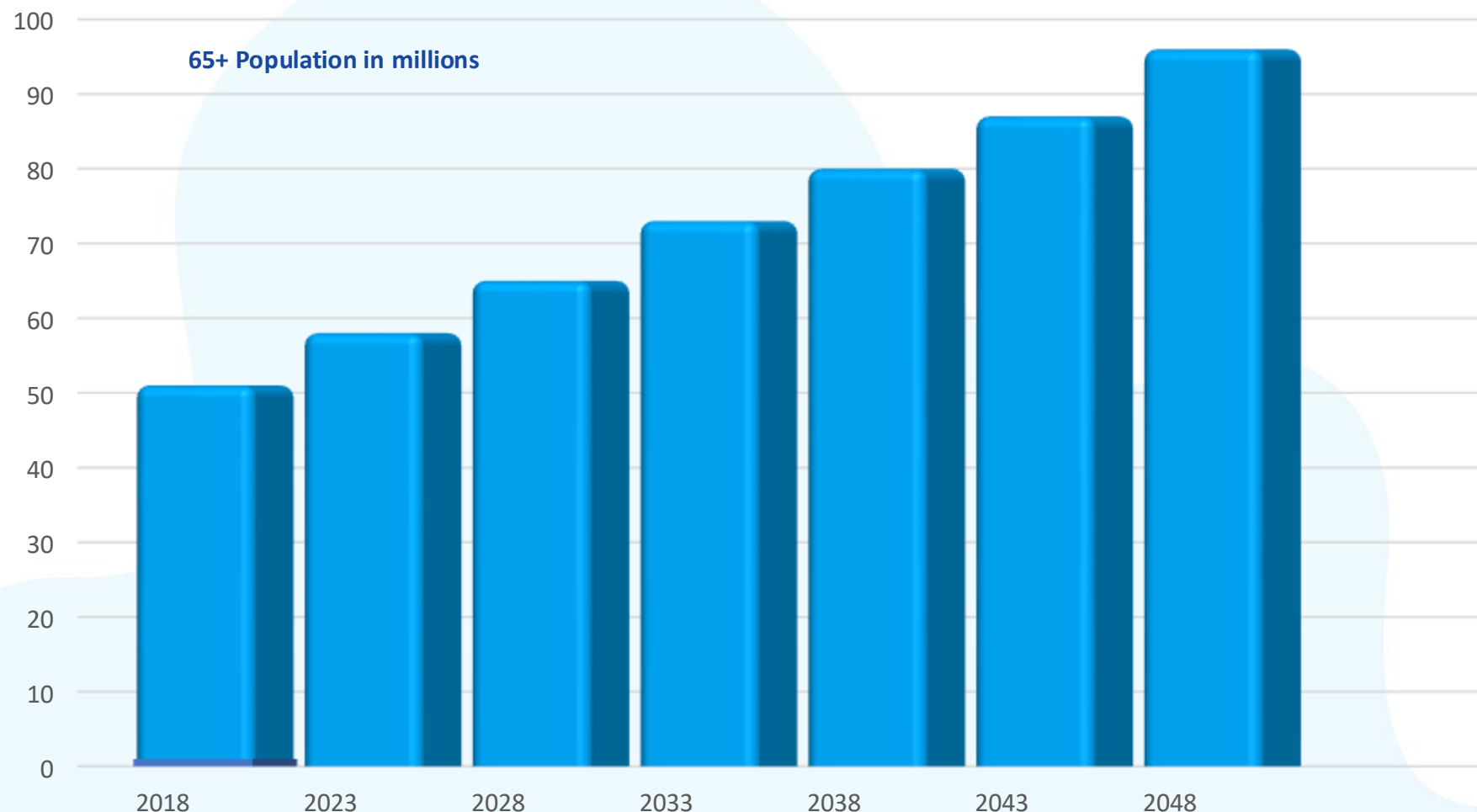
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# A Growing Industry – Serving the Silver Tsunami

♥ In-home senior care is a **\$16.1B business** in the U.S. alone and will continue to grow for the next couple of decades

♥ The 65+ age group will make up a growing portion of the US population





# A Growing Industry – Right Business, Right Time

## GROWTH

**Nearly 70%**

of all seniors will  
develop disabilities in  
their lifetime

**Every  
66 seconds**

another American  
develops Alzheimer's  
disease

**Since 2020**

over 87 million  
Americans are living  
with multiple chronic  
illnesses

**By 2030**

More than 20% of all  
Americans will be over  
65



# A Growing Industry – Ripe for Disruption



By cutting out the middleman of the traditional homecare agency, families get higher quality care that is tailored to their specific needs.



In the past, it was possible to hire in-home Caregivers through an agency for \$20 - \$25 per hour. Now, most agencies are charging \$32 - \$45 per hour or more.



By hiring Caregivers directly through HALLMARK HOMECARE, FAMILIES CAN SAVE AS MUCH AS 50% ON COSTS for excellent care at home.



***Turn Back the Clock on Costs***



# A Growing Industry – Ripe for Disruption

## Traditional Agency Model

National Overtime  
Exemption for Caregivers

**NO** Overtime required  
in ALL STATES

LOWER POOL OF QUALIFIED CAREGIVERS  
because demand for service exceeds pool  
of Caregivers who will work for low pay.



BIGGEST IN-HOME  
CARE THREAT IS SUPPLY OF  
QUALIFIED CAREGIVERS



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National Overtime  
Exemption for Caregivers

**YES** Except in  
Certain States

GREATER POOL OF QUALIFIED CAREGIVERS  
because Caregivers make more money with  
more desirable shifts.

# L

## Leadership with Experience

“The experience and resources provided by the Hallmark leadership team was a big attractor for us to join the Hallmark Homecare franchise family. Steve Everhart has assembled an outstanding team to support scaling and long-term growth, which was crucial for us. The Independent Caregiver model stood out as unique compared to others and we recognize that the Hallmark Homecare model is an industry disruptor. We are thrilled to be at the forefront of launching this superior offering for our community.”

— Justin Peterman, Franchisee



# Path of Success



Steve Everhart founded *The Seniors Choice* in 1999 and built that traditional homecare membership business to **700+ units**.

The challenges associated with the traditional model prompted the creation of Hallmark Homecare model.



Hallmark Homecare Founded

## 2013

## 2020

First Franchisee Launched in Long Island, NY

PAUSE  
PANDEMIC

2 Franchisees & 6 Territories Open

## 2022

## 2025

60 Franchisees & 157 Territories Open or in Development

Totals as of 3.27.25



# Leadership With Experience

The Hallmark Homecare franchise is a business that has the leadership team to make it all work. **Having built other franchises, including The Senior's Choice**, our experienced leadership and support teams help Franchisees be successful and accomplish their financial, professional and personal goals.



**Steve Everhart**  
Founder & CEO



**Mike McLain**  
Chief Growth Officer



**Julie-Ann Parrott**  
COO



**Tony Fulton**  
President



**Kelly Glennon**  
Chief of Staff



## Low-Cost & Simple Franchise Model



Hallmark Homecare is committed to finding the right caregiver to client match, not just filling a time slot. We aim to match for long term relationships, which means I have a reliable database of caregivers to service the increasing need in the marketplace.”

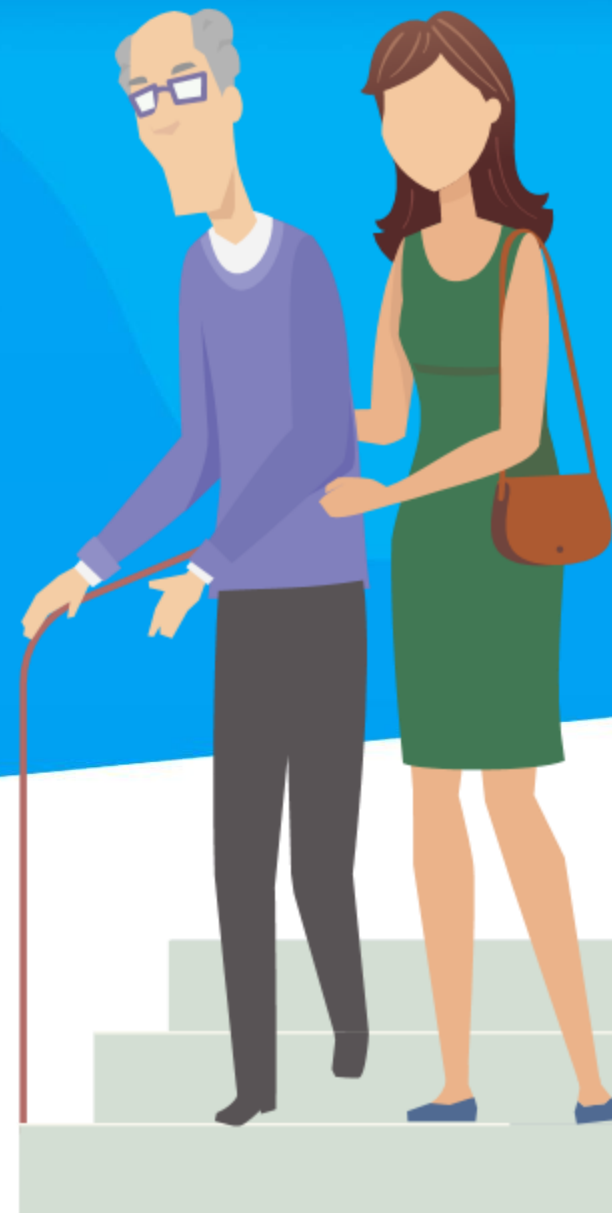
– Phil Herron, Franchisee



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# Low-Cost - Item 7 Investment Range

EXPENDITURE	1 TERRITORY	MULTIPLE TERRITORIES (2-5)
Franchisee Fee – One Protected Territory (2)	\$59,500	\$59,500
Franchisee Fee – Two to Five Protected Territories (2)	\$99,500	\$204,500
Equipment & Supplies (3)	\$1,500	\$4,000
Initial Marketing (4)	\$2,500	\$6,000
Travel & Living Expenses During Training (5)	\$1,500	\$2,000
Miscellaneous Opening Costs (6)	\$1,000	\$2,000
Professional Fees (7)	\$500	\$2,500
Insurance (8)	\$3,000	\$3,500
Additional Funds – 3 Months (9)	\$40,000	\$55,000
<b>TOTAL ESTIMATED INVESTMENT (One Protected Territory) (10)</b>	<b>\$109,500</b>	<b>\$134,500</b>
<b>TOTAL ESTIMATED INVESTMENT (Two to Five Protected Territories) (11)</b>	<b>\$149,500</b>	<b>\$279,500</b>

Single Territory:

**\$109,500 to \$134,500**

Multiple Territories:

**\$149,500 to \$279,500**



# Simple Franchise Model - Minimal Employees

## Comparing a \$2MM Revenue Business

### Traditional Agency Model

**75-95**  
employees

Owner/Operator: 1 FTE  
Office/Admin/Recruiter: 7 FTE

**Caregivers: 70-90**

Caregiver Turnover: 65% annually  
Clients: 90



**2**

employees

Owner/Operator: 1 FTE  
Office/Admin/Recruiter: 2 FTE

**Caregivers: 0**

Client Turnover: 0% annually  
Clients: 30



# Simple Franchise Model – Home Based

Traditional  
Agency Model

## EXTERNAL OFFICE SPACE

Majority of states require licensing

Can be lengthy and costly process

Differs by state



## HOME-BASED BUSINESS

State License NOT APPLICABLE

except in a few states





# Simple Franchise Model - Caregivers Employed by the Client

Traditional  
Agency Model



**CAREGIVERS EMPLOYED  
BY AGENCY**

**Average Caregiver Wage:**  
**\$12.50 - \$15.00/hour\***

\*HC Pulse Benchmark Report

**CAREGIVERS EMPLOYED  
BY CLIENT**

**Average Caregiver Wage:**  
**\$16.00 - \$25.00/hour**





## Meaningful Work

We want to express how grateful we are to the Hallmark team for holding our hands throughout the process of placing caregivers with our grandparents. We've worked with homecare teams in the past, but yours was extraordinary compared to past experiences. You were very patient, focused, organized, timeline and compassionate with us. Thank you for your dedication and assistance. It makes a difference."

— Joshua & Kate



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# Meaningful Work . **WIN! WIN! WIN!**



## CLIENTS **WIN**

More affordable client-centric care



## CAREGIVERS **WIN**

Higher weekly pay, more hours, better shifts



## FRANCHISEES **WIN**

Less overhead, larger pool of caregivers, attractive profit margins, few employees

A

## A Strong Support System



With a background in healthcare, I recognized that the Hallmark Homecare franchise model meets an increasing need in the market. While there are formal processes and protocols for successful business operations, there is also an amazing support team that cares about your success and is always available when help is needed.”

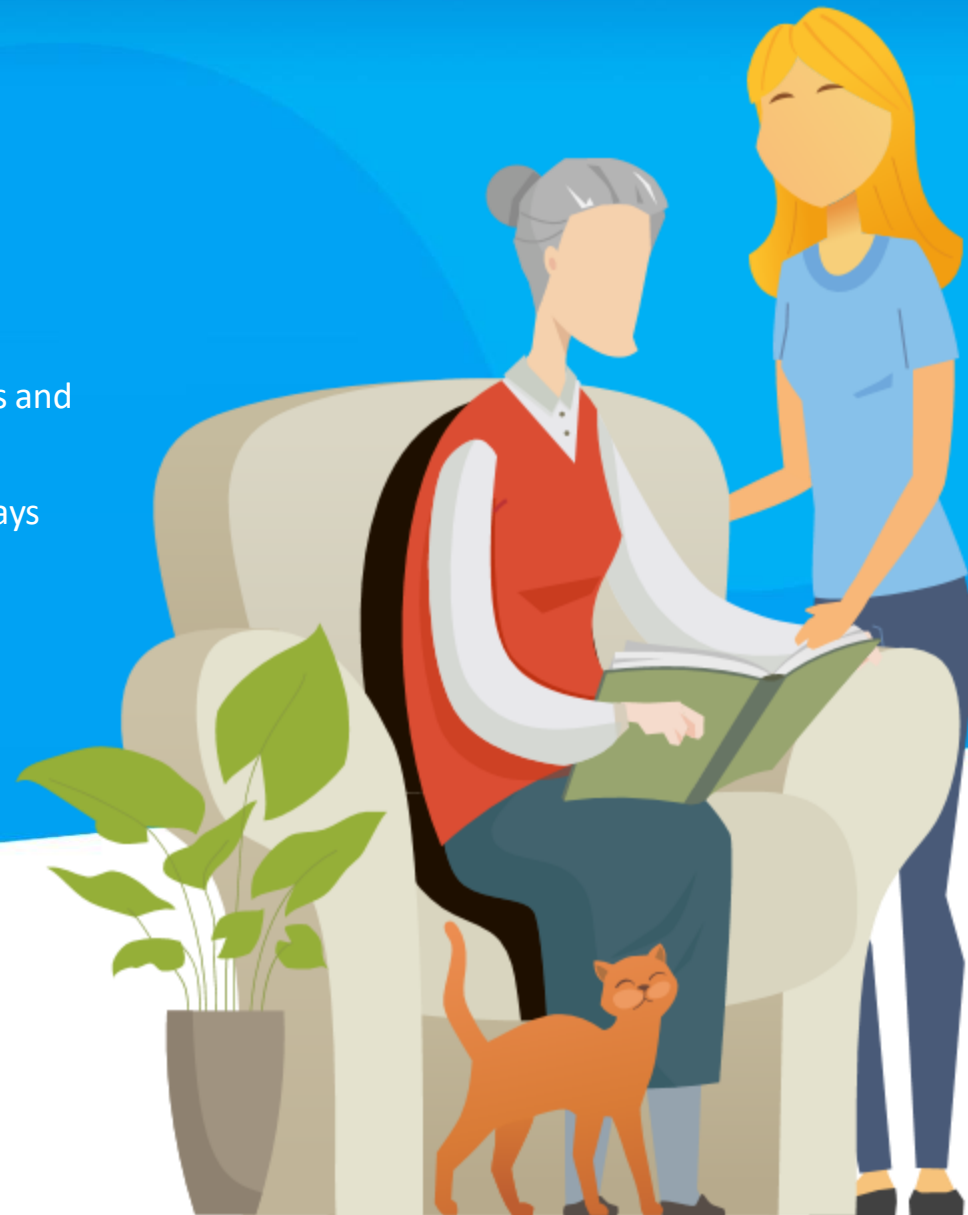
— *Melissa Reuter, Franchisee*



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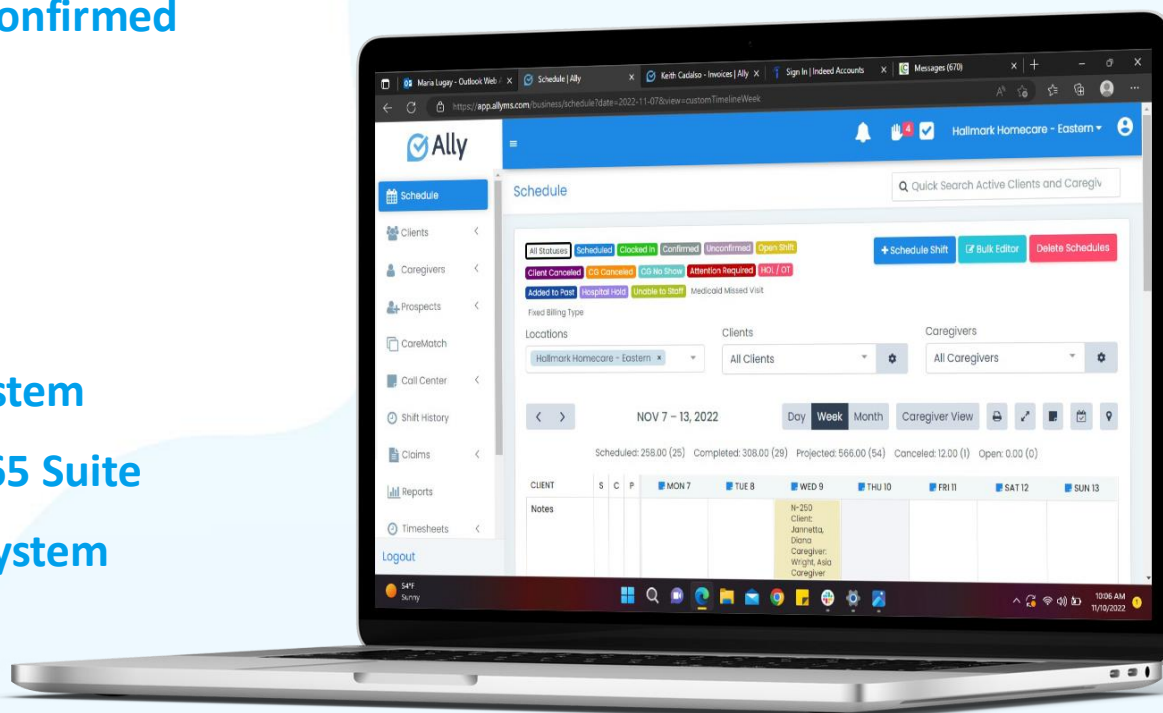
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# A Strong Support System - Technology Toolbox

## Business Management System

- ♥ Tracking caregiver hours confirmed with geo-tracking
- ♥ Payment processing
- ♥ Payroll
- ♥ Tax reporting
- ♥ Learning Management System
- ♥ Branded Email & Office 365 Suite
- ♥ Franchise-wide Intranet System



## Business Management System

- ♥ CRM for Clients and Caregivers
- ♥ Caregiver quality assurance & tracking
- ♥ Background checks
- ♥ VOIP Phone System
- ♥ Secure document sharing

# A Strong Support System

## Sales, Marketing & Recruiting

Franchisees receive tested and proven technical, operational and marketing support

- ♥ Marketing materials/promotional collateral
- ♥ Website landing page
- ♥ Ongoing one-on-one coaching
- ♥ Comprehensive manuals
- ♥ Instructional online training series
- ♥ Recruiting guidelines
- ♥ Frequent webinars
- ♥ National conventions

### TOP MARKETING STRATEGIES

- 1 Referral Partnership Visits
- 2 Leads Group
- 3 Networking Events
- 4 Speaking Engagements
- 5 Internet Marketing
- 6 Online Directories



# Franchise Support Systems

Bookkeeping



Payroll



Recruiting



Insurance



Franchisee Marketing



Background Checks



Franchisee Store



Technology





# A Strong Support System— Referral Partnerships

## Primary

- ♥ Hospitals
- ♥ Home Health Companies (Medicare)
- ♥ Rehab Centers
- ♥ Large Multi-Physician Practices
- ♥ Residential Care Facilities

## Secondary

- ♥ Nursing Homes
- ♥ Other Homecare Agencies
- ♥ Geriatric Care Managers
- ♥ Outpatient Surgery Centers
- ♥ Dialysis Centers
- ♥ Bank Trust Officers
- ♥ Human/Family Service Agencies
- ♥ Adult Day/Senior Centers
- ♥ Elder Law Attorneys
- ♥ Public Guardians
- ♥ Area Agencies/Offices on Aging



## Ramp Up Quickly



We were attracted to the Hallmark business model because of it being a mutually beneficial relationship for the clients and caregivers – a true win win. We are also keen on being part of the solution to problems that so many families face.”

– Alistair Anthony, Franchisee



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# Ramp Up Quickly

## NO HURDLES = START EARNING MONEY FAST



**NO LICENSING  
REQUIRED IN MOST  
STATES**

Instead of spending months to get trained, get licensed, hire Caregivers and then start marketing, **we have a process to get you up and running as fast as you want.**

Our experienced support team helps you shave off months of your potential ramp-up with current, relevant training, support and one-on-one coaching. We are with you every step of the way.



# K

## Key Takeaways



My experience in working with Denise and Hallmark Homecare has been exceptional. Frankly, incredibly exceptional.

I'm from the northeast and needed services for my mom and dad in Florida and Denise has always made herself available; providing information and details about all the services Hallmark provides in a caring, professional and confident manner. No question, I'd recommend Hallmark Homecare."

– Sarah



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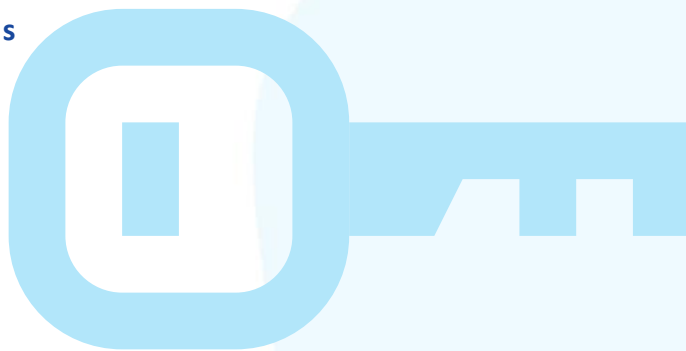
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# Key Takeaways

- ♡ Seasoned leadership team with over 80 years of combined Homecare experience
- ♡ Low investment
- ♡ Fast ramp up to cash flow... within months
- ♡ Home-based business
- ♡ Low overhead with high margins
- ♡ Few employees required
- ♡ Proven, turn-key systems
- ♡ Meaningful work that makes a difference
- ♡ Significant cost-savings to clients of as much as 50%
- ♡ Caregivers earn more than working for traditional Agencies
- ♡ Higher Caregiver wages means access to a larger pool of “cream of the crop” Caregivers
- ♡ Whoever has the best caregivers wins
- ♡ Clients have greater control and increased Caregiver retention
- ♡ Experienced, insured, bonded, and fully vetted Caregivers
- ♡ Disrupter in the growing, recession-resistant, multi-billion-dollar senior care industry





# Ideal Candidate

- ♥ People Skills are a Must, Solid Communication Skills / Enjoys Networking
- ♥ Consultive Sales / Marketing / Business Development Experience / Relationship Builder
- ♥ Medical Device & Pharmaceutical Sales & Medical Recruiting Backgrounds would be great but Not Required
- ♥ Desire to Help Others and to “Make a Difference”



NET WORTH: **\$200,000**

LIQUIDITY: **\$100,000**

# Hallmark Homecare Ownership Models

## OWNER/OPERATOR MODEL

- ♥ Franchisee is Full-Time & Actively Involved in the Day-To-Day Business Responsibilities
- ♥ Franchisee Attends Training
- ♥ Franchisee Likely Wears Multiple Hats (ie: Sales, Operations, Admin)
- ♥ Low Overhead to Manage
- ♥ Main Source of Income With No Other Obligation

## EXECUTIVE MODEL

- ♥ Franchisee Can Have the Flexibility for Other Business Ventures or Franchises, Not a Full-Time Job
- ♥ Franchisee Hires the Key Roles to Perform Day-To-Day Business Responsibilities
- ♥ Franchisee Facilitates and has Experience Managing a Team (Hiring and Firing)
- ♥ Franchisee Completes Training
- ♥ Franchisee is the CEO of their Franchise

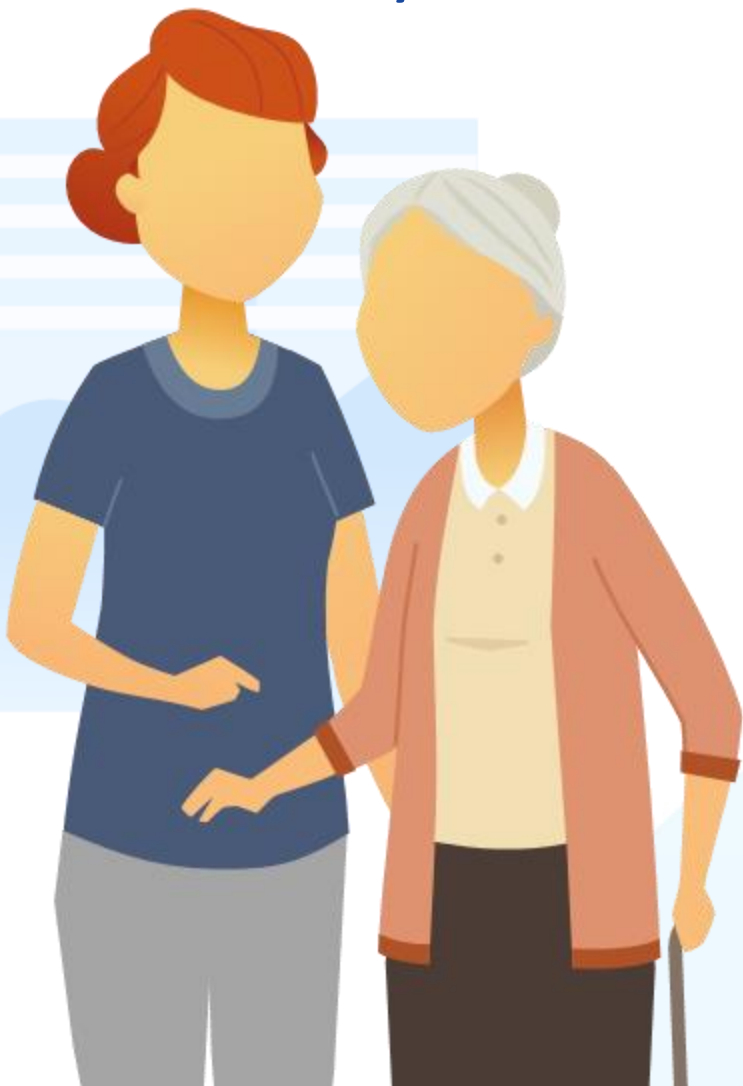
## GENERAL MANAGER MODEL

- ♥ Franchisee Can Keep Full-Time Job because GM is the Operating Partner
- ♥ GM Attends Training with Franchisee
- ♥ GM Facilitates Building A Team and Maintaining the Team (Hiring and Firing)
- ♥ Franchisee Mentors & Coaches the GM
- ♥ GM Will Require Compensation or Profit Sharing, Longer Financial Runway Required
- ♥ Franchisee Does Long-Term Business & Strategy Planning
- ♥ Franchisee has Business Ownership Experience & Track Record of Passive Ownership

*Hallmark Homecare approves candidates and their proposed model on a per case basis.*



# Summary



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