

# Hallmark Homecare

## Two-Minute Drill

# Business Profile

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## Contact Information

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Corporate Office Location	Corporate Office: Incline Village

## Overview – Presentation Points

### Brand Summary

Hallmark Homecare is different than all other homecare franchises. We are a **referral agency** for **caregiver recruitment** and **client matchmaking**.

Hallmark Homecare is an **industry disruptor**, as it's **solving challenges** that the overregulated, high-cost, unhappy, provider model of traditional senior care industry faces.

- Clients save **money**, receive better **care**, and have more **control**.
- Caregivers earn **higher wages** and enjoy a **preferred work arrangement**.
- Franchisees enjoy **handsome profits** and **make a difference** in the lives of others.

### For the Family (Client):

We interview the family (client) and senior who need help. Hallmark then develops an ideal Caregiver profile. We do all the vetting and background screening of prospects, and then give the client access to Caregivers that are experienced, educated, and have professional certifications. Clients then interview and choose a Caregiver that is specifically tailored to their needs.

Unlike a traditional homecare agency, the family is the employer of the Caregiver(s) and has complete control of the relationship allowing them to make all the decisions related to their care.

### For the Caregiver:

Caregivers prefer working with Hallmark Homecare because they work direct with the family, they can earn higher wages, and they have more control over their schedule. Hence, we have a large pool of qualified Caregivers to choose from. Labor shortage is not a factor for the Hallmark Homecare model.

**For the Franchisee:** The Hallmark Homecare business model is more profitable than a traditional homecare agency with less overhead and fewer employees. The model is largely unregulated, which means the franchisee is not spending as much time with compliance and licensing fees and protracted start-up timeframes.

With the home-based model and two-phase launch programs, franchisees can be operating their business and generating revenue within days.

Hallmark Homecare provides a win-win-win, for the Client, the Caregiver, and the Franchisee!

Competitive Advantages

In the same way the direct-buy and gig-economy opportunities (Uber, Airbnb, etc.) are cutting out middlemen and connecting consumers directly to service providers, Hallmark Homecare is doing the same for in-home senior care.

- Clients save **money**, receive better **care**, and have more **control**.
  - They experience greater continuity of care. We will never run out of seniors and their families who want these benefits.
- Caregivers earn **higher wages** and enjoy a **preferred work arrangement**.
  - Our large pool of cream-of-the-crop Caregivers want to work more, earn more, and have longer-lasting relationships with the families. Labor shortage is not an issue.
- The innovative, unique Hallmark Homecare model sets up franchisees for **speedy ramp up** and **unlimited profitability** in a growing market of need.
  - The launch program for new franchisees propels a faster and more affordable entrée to success in the senior care industry.

This unique model offers a simpler approach with a shift in costs, positioning Hallmark Homecare to be an industry disruptor!

Top 5 Selling Points

- The preferred approach for senior care: 1) Clients save money, have better care & more control. 2) Caregivers earn higher wages, travel less and work more hours.
- Fast ramp up: Hallmark’s launch program gets franchisees operating and generating revenue within a few weeks.
- The model is simple with low investment, low overhead and high profit potential. Enjoy a \$2MM home-based business with 2 employees.
- Convenient training and one-on-one support
- Industry disruptor in fast growing, high-demand industry

Ideal Franchise Candidate

The ideal candidate will be passionate and dedicated to making a difference in the lives of others as a *community connector*. Business development and direct sales in their local community is critical for success.

Ideal franchisees should be solid communicators, networkers, and relationship builders. While human resources, healthcare, medical sales experience is not required, it is helpful.

A full-time, dedicated effort must be made to marketing and sales, whether the franchisee hires out this role or does it themselves. There are multiple marketing strategies for recruitment efforts. However, initial success comes from “old school” sales tactics, such as relationship building, networking, and more, among the healthcare sector of their community. The right personality and dedicated effort to business development is critical for launch success.

Major Competitors

Hallmark Homecare does not have any direct competitors, as our model is so different from the traditional senior care model. Indirect competitors: Homecare agencies and independent caregivers

Business Basics	
Industry	Non-Medical Homecare
Industry Size	\$16.1B
Year Business Started	2013
Year Started Franchising	2022
Franchise Units Awarded	191
Franchise Units Open	157
Company Units Open	0

Number of Franchisees	60
Royalty	6%
Brand Fund	1%
VetFran Discount	\$5,000 off initial territory franchise fee
SBA Registry	Yes
Group Health Insurance	No
In-House Financing	No
Semi-Absentee Ownership	Yes â€” Immediately, with a full time salesperson and meeting certain requirements. A Franchisee can progress to a semi-absentee role over time.
E2/Visa Candidates	No

Financial Details

Investment range	1 Unit: \$109,500 – \$134,500 / Multi-Unit: \$149,500 – \$279,500
Required Net Worth	\$200,000
Required Liquid Capital	\$100,000

Item 19 Earnings Claims

Franchisee Data:

Gross Sales: \$1,012,290

Revenue Less Expenses: \$217,242

Average Monthly Revenue per Client: \$8,013

Average Number of Clients Served per Month: 11

Franchise Fees (1 – 10 Units)

1 Unit	\$59,500
2 Units	\$99,500
3 Units	\$134,500
4 Units	\$169,500
5 Units	\$204,500

Approximate Breakeven Time Frame

6 months to when a Franchisee can/should expect to reach monthly cash flow breakeven

State Registrations & Territories

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Approved Registration States	HI, IN, MI, MN, SD, VA & WI
Registration Pending	
States Not Registered	CA, IL, MD, ND, NY, RI, WA
Available in Canada/Internationally	No
Territory Description & Minimum Requirements	Each territory is a contiguous area with a population of 50,000 to 250,000.
Territory Protection	Yes
Master/Area Development Opportunities	No

**Sold Out Markets**

- Austin, TX
- Boca Raton, FL
- Chandler, AZ
- Columbia, SC
- Gilbert, AZ
- Huntsville, AL
- Jacksonville, FL
- Louisiana
- New York
- Richmond, VA

Business Operations

Function & Daily Tasks of the Owner-Operator	<ul style="list-style-type: none"> <li>Implement sales/marketing/development plan</li> <li>Visit with referral partners (bagel &amp; donut drops)</li> <li>Participate in networking events</li> <li>Coordinate collaborative tasks with corporate (Level 1)</li> <li>Care Consultations &amp; Coordination</li> <li>Caregiver Recruitment, Screening &amp; Vetting</li> <li>Client Matchmaking</li> <li>Back office administrative tasks</li> <li>Customer Service</li> </ul>
Function & Daily Tasks of the Semi-Absentee Owner	<ul style="list-style-type: none"> <li>Develop a team to fulfill daily tasks listed above</li> <li>Manage employees fulfilling tasks from the owner/operator role</li> <li>Provide leadership for a culture of care and commitment to excellence</li> <li>Develop and implement expansion plans</li> <li>Speaking engagements and networking as brand ambassador</li> <li>Nurture referral partner relationships</li> </ul>

Number/Type of Employees	<p>None required for the owner/operator of a single territory (initially).</p> <p>1-2 are suggested to support growth over time.</p> <p>Franchisee will need around 2+ employees for a \$2MM business (Recruiter, Sales &amp; Marketing, Admin).</p>
Real Estate Description	N/A – Home-Office Based Business
Home Based	Yes
Target Customer	The senior population and their families that can pay privately for in-home, non-medical care.
Business Model	B2C

## Support & Training

### Confirmation Day Structure

Virtual Confirmation Day is a One Day Event

(11am ET – 3pm ET)

- Hallmark Vision & Why
- A Day in the Life of an Owner
- Client Acquisition & PartNEER Development
- Caregiver Recruitment & Matchmaking
- Systems & Technology
- Scaling Your Business
- Onboarding, Training & Support

### Initial Training

Hallmark Homecare has a strategic launch program to ensure franchisee success.

Initial training two levels. Level One is a home-based 5 week program and can commence as soon as the franchise partnership is confirmed. It includes approximately 40 hours per week of home-based study.

- Video-based training series
- Online learning system
- Industry overview
- Marketing basics
- Sales and development direction
- One on one scheduled coaching
- As needed (on demand) assistance
- Business setup and growth planning
- Corporate handles all recruitment and placement
- Back-office tasks are handled by Corporate

Support and training is ongoing beyond initial training. Level Two training is 4 days of live instruction with the leadership team at the training center in Irvine, CA.

- Sales and marketing
- Business administration and management
- Client interview
- Caregiver search and recruitment
- One on one scheduled coaching
- As needed (on demand) one-on-one assistance
- Monthly webinars
- Annual Convention and regional meetings

Franchisees can quickly progress to assume full, independent operation of their business within 60 days (in most states) due to this accelerated launch program.

## On-Going Support

**One-on-one coaching starts at launch but is ongoing to support growth and success.** Franchisees will also participate in continued education opportunities, conferences, and more to increase momentum and ensure sustainable success.

## Marketing Strategies

### Helping Franchisees Acquire Clients and Caregivers:

We have years of experience with how to find families and Caregivers, and we know there are many ways to find them. We have identified specific pillars of marketing and the timing for these strategies. The support team coaches franchisees on timing to engage certain strategies based on their market, skills of the franchisee, their progress in the launch phase and beyond.

1. Referral Relationships from the Healthcare Community
2. Online Listings, Digital Marketing, social media and Gorilla Marketing tactics

We coach franchisees through simple (and easy) techniques to develop the high value referral relationship channel.

Hallmark provides a suite of assets for franchisees to use in their marketing efforts, and we advise on best practices.

## Management Strength of Franchisor

Hallmark Homecare is not the first franchise launched by Steve Everhart, CEO/Founder. He led the team that launched and built The Senior's Choice to 700 agencies, and he's on a path to surpass that success with Hallmark Homecare. The seasoned leadership team is committed to support franchisees as they deliver exceptional in-home care that is win-win-win for the client, the Caregiver, and the franchisee.

### Founder & CEO: Steve Everhart

Steve is a successful entrepreneur who has built and operated several companies over the past 40+ years including The Dentist's Choice, Inc., The Senior's Choice, Inc., and Hallmark Homecare, Inc. Prior to that, he was a practicing CPA with Ernst & Young. He is a frequent guest lecturer and presenter on developing and operating senior care companies and issues facing the elderly and their families. Steve is a dedicated family man and enjoys spending time with his wife of 40 years, Nona, staying active in several sports, and spoiling his beautiful grandkids.

### Director and Administrator: Nona Everhart

Nona has been the Administrator and a Director of Hallmark Homecare since its inception. During the years 1999–2020, Nona Everhart also served as the Administrator and one of the Directors of The Senior's Choice, Inc. and The Dentist's Choice, Inc. headquartered in Incline Village.

### President: Tony Fulton

Tony has been the Hallmark Homecare President since May 2023 having first joined the team as a Board Member and Special Advisor to Franchise Partners in April 2023. He is the Founder, Owner and President of Guardian Angels Homecare, Inc. in Lincoln, Nebraska, a member company of our affiliate, TSC, since 2003. During this time Tony also served two terms as Nebraska State Senator (2007–2013) and as Nebraska's 23rd Tax Commissioner (2016–2022). He has also served on numerous Board of Directors since he began his career in 1997. He serves in his present capacities in Lincoln, Nebraska.

### Chief Growth Officer: Mike McLain

Mike is the Chief Growth Officer of Hallmark Homecare and is also the Owner of a successful Recruiting Firm, Altus Recruiting. Mike has focused on Executive Recruiting & Staffing since 1996 when he founded Altus Recruiting, and he was a former franchisee of The Seniors Choice. Mike has a passion for helping people improve their careers or start and grow their own successful small businesses through the proven formula of franchising. From 1987 to 1996 Mike served in Sales and Sales Leadership roles with Xerox Corporation, Penske Corporation, and Ciox (fka Ciox/Smart Corp.). In 1987 Mike graduated with a bachelor's degree from UCLA. Mike resides with his wife, Wendi, in Orange County, CA and they have 3 sons who play college and/or professional baseball.

### COO: Julie-Ann Parrott

As a strategic, results-driven, accomplished entrepreneur with 25 years of visionary leadership in the senior living space, Julie-Ann Parrott is a highly experienced operations leader and team builder with a passion for developing people and structuring organizations for growth. She, in partnership with her husband Steve of 28 years, built their own homecare business from the ground up and ran it for 20 years while juggling the delicate balance of entrepreneurship and family. Julie-Ann also holds the distinction of being an Expert Strengths Strategist and Leadership Coach. Her focus and passions revolve around building powerful collaborative, interdependent teams within her organization while helping each of her colleagues reach their best and highest potential. As a result of her strength-focused leadership style, her home care partners will receive top-notch service from a support team that is highly skilled and passionate about serving! Julie-Ann has worked alongside Steve Everhart since 2003 as a member of The Senior's Choice Network. "When Steve had the vision of Hallmark over a decade ago, I knew right away that this was a much-needed solution in the home care market back then. Time has only proven that this concept is now desperately needed. It is my honor to be a part of helping our Franchise Partners bring this solution to

market.” Julie-Ann will be overseeing the operations of Hallmark Home Care and Franchise Development support for all the Franchise Partners.

**Chief of Staff: Kelly Glennon**

Kelly has been Hallmark Homecare's Chief of Staff since its formation in January 2023. She also served as the Chief of Staff of HHI since September 2014. Prior to that she was the Director of Operations for Encore Senior Homecare in Excelsior, MN for three years and served in a similar capacity for Beehive Home Memory Care Facility of Excelsior for equal duration. She serves in her present capacities in Donnelly, Minnesota.

**Financial Strength of Franchisor**

Principally owned by the Everharts and well-capitalized.

Site Selection Assistance	N/A - Home-Office Based Business
Lease Negotiation Assistance	N/A - Home-Office Based Business
Recruiting Assistance	During the initial launch phase (Level 1), Hallmark corporate handles all recruiting and back-office tasks in favor of the franchisee.

Overcoming Objections

Issues & Ambushes

**Staff shortages** – The Hallmark *direct-hire model of care* allows for caregivers to make more money, with more hours, meaning no shortages of labor.

**Licensing** – except in a few states there is not applicable licensing requirements for the Hallmark model of care. This propels a faster ramp-up than the traditional senior care agency.

**Affordability** – The Hallmark *direct-hire model of care* cuts out the "middleman" (the traditional agency) providing a more affordable in-home care solution.

**Newness of franchise concept** – Our executive team has 80+ collective years of senior care experience and a well- established proven direct-hire model of care having established the corporate office in 2013.

**Number of employees** – just a few sales and administrative employees as the business grows. Caregivers are employed by the families, not by Hallmark.

**High overhead costs** – Hallmark is a home-based operation with low overhead, a remote workforce and high gross profit margins.

**Liability** – Caregivers are not Hallmark employees but we do insure the acts of the caregivers with professional liability insurance coverage and fidelity bond along with occupational accident insurance coverage.

Hooks & Hangers

- Hallmark Homecare solves the challenges that traditional senior care will continue to face. As families are already hiring independently, the Hallmark model is taking this approach mainstream to make it easier for families and Caregivers.
- Positioned to be an industry disruptor
- Hallmark Homecare provides a win-win-win, for the Client, the Caregiver, and the Franchisee!
- The home-based model has no employees at launch for the owner/operator.
- The overhead is low and it can launch and ramp up quickly.
- 1-2 remote employees will be hired over time to support growth.
- Full time business development starts from Day One and if the franchisee is not the full time owner/operator, this role must be hired from the start.