



Franchise Information Report

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What Does CarePatrol Do?

There are more than 30,000 assisted-living communities in the United States, and all of them are different. Beyond the care these communities offer, they differ in terms of costs, availability, specialization and performance history. When the news that an aging parent or a loved one needs the care of an assisted-living provider for a disease such as Alzheimer's, dementia, cancer or another kind of illness, families are often rushed to make a decision in a deeply emotional state.

CarePatrol assists seniors and their families with the difficult task of identifying the most appropriate assisted living, independent living, memory care community, or residential care community in their area. Each of our offices contract with dozens of providers in their region and are paid when a client

is placed with one of them. The service is provided at no charge to clients, as our franchisees are paid directly by the thousands of providers in their network. It's a business in which everyone benefits and feels tremendous satisfaction every time the service is performed.

"Life can dramatically change—whether you've planned for it or not," says Becky Bongiovanni, co-founder of CarePatrol. "When aging loved ones become ill, the family is entering uncharted territory. We come in as the expert. Our job is to help people get the care they need at the place that can provide it, and help the families understand what they're looking for so that they can make informed decisions. There are so many places out there, and not all of them provide the same type of care."



What Makes CarePatrol the Leading Senior Care Advisory Company?

When the family member of an older adult calls a CarePatrol senior advisor, they are often in crisis. Their loved one needs immediate care in a community that can treat a specialized need. While some companies simply respond with a long list of communities for the anxious and stressed client to research, we do the exact opposite.

Our franchisees guide their clients through the daunting task of finding a quality and safe assisted living, independent living, or memory care community for their loved one. Our proprietary system helps determine exactly which care options will be the right fit for our clients.

To help our clients make a truly informed decision about where to place their loved ones, our franchisees take a hands-on approach. They tour assisted-living communities with the families, and they provide comfort, support and expertise throughout the whole process.

“We hear countless stories of how our franchisees are impacting the lives of families across the nation on a regular basis,” says Becky. “They live and breathe this work, and we’re enormously proud that we can provide a profitable business model that truly makes a real, lasting difference in the lives of so many.”



The CarePatrol Franchise Story

CarePatrol is America’s leading senior care advisory company.

The CarePatrol franchise was founded in 1993 by social worker Chuck Bongiovanni after he observed the trauma of a family whose loved one was placed in the wrong type of care. We became the pioneer organization of the now-thriving senior advising industry. Today, we’re helping families make safe choices all over America and are developing our brand with steady and calculated growth to ensure a superior platform for the support of our franchisees nationwide.

The challenge to find a community suited to care for a senior is usually one of the most challenging and emotional experiences for the immediate family, who often are not equipped with the knowledge necessary to make a good decision. CarePatrol is not only the founder in senior care advising; we are well positioned to be the leader for many years to come.

The Market for Senior Living

Aging is a universal phenomenon, and if we're lucky, we all get to experience living to a ripe old age. The advancements in science and medicine are helping more people live longer than ever.

This influx of new seniors on a daily basis is creating an enormous demand for assisted-living, nursing homes, and home health care. This makes sense, as with the average life span approaching 80, the number of people suffering from chronic diseases is on the rise. According to the New York Post, "the number of people suffering from four or more chronic diseases is expected to double by 2030," with cancer and diabetes leading the list – and a third of all seniors will be diagnosed with a cognitive disability such as dementia or depression.

"In 2010, one-sixth of the adult U.S. population was older than 65; by 2030, about one-fourth will be."

– The Atlantic Monthly, "Who Will Care for America's Seniors?"

"By 2050, the number of individuals using paid long-term care services in any setting (e.g., at home, residential care such as assisted living, or skilled nursing) will likely double from the 13 million using services in 2000, to 27 million people. This estimate is influenced by growth in the population of older people in need of care."

– Caregiver.org

"Among the population aged 65+, 69% will develop disabilities before they die, and 35% will eventually enter a nursing home."

– Caregiver.org

"As the Baby Boomer population ages, society is on the cusp of dealing with an unprecedented number of senior citizens who will need elder care. The United States home care market is expected to grow from \$100 billion in 2016 to \$225 billion by 2024, driven by an expanding elderly population. An intensifying shortage of US home health aides and physicians, a booming senior population, and the prevalence of chronic illnesses all point to a need for transformative solutions when it comes to senior care services."

– Insider Intelligence

"Now is the best time to invest in a CarePatrol franchise," says Becky Bongiovanni, president and co-founder of CarePatrol. "Millions of Americans are becoming senior citizens on an annual basis, and many of them can no longer live safely at home, which has created an enormous demand for senior living. Our low cost to entry and proven business model have helped dozens of entrepreneurs find lasting success in business. Because the demand for our services is only going to increase, CarePatrol is poised to grow for years to come."

The demand for senior care is skyrocketing;
today's seniors and their families need your help.

5 Reasons to Own a CarePatrol Franchise

1 | BUSINESS WITH PURPOSE

While many people want to help others, CarePatrol is a special business that needs the right people to become franchise owners. Owning a CarePatrol franchise is the ideal way to own a business that exists to help others, especially seniors. You must have a heart for this type of work.

2 | LOW INVESTMENT

CarePatrol is one of the most affordable investment opportunities in the senior care industry. For less than \$131,000, you have the potential to make a great living for yourself.

3 | SIGNIFICANT EARNING POTENTIAL

In 2023, our top-performing franchisee earned more than \$1,702,759 in revenue, and our overall franchisees earned on average \$320,487 in revenue per territory.

4 | TRAINING AND SUPPORT

CarePatrol has one of the most intensive training platforms in the industry. We will help you through every step of the process of becoming your community's most trusted senior care advisor.

5 | STRONG CORPORATE CULTURE

CarePatrol started as a result of seeing the problems that occur when families are ill-equipped or have no time to find the safest senior living options on their own.

CarePatrol is one of the most affordable franchise opportunities on the market with

What Does It Cost to Own a CarePatrol Franchise?

tremendous earning potential. Our home-based business model substantially lessens the financial barriers to franchise ownership, making CarePatrol an accessible and proven route for entrepreneurs who want take control of their future in a growing business that makes a real difference in people's lives.

The total initial investment to open a new CarePatrol franchise ranges from \$60,120 - \$130,970. Our low entry cost has grown out of more than 30 years of expertise in helping our franchisees grow thriving businesses in their communities.

Financing Options

CarePatrol offers long-standing relationships with top national funding partners who can assist with a variety of funding options.

How Much Money Can I Make?

Growth and Earning Potential

There is no question that the CarePatrol business model is capable of financial success, although that success is dependent on how closely you follow our business model. In 2023, our top-performing franchisee earned more than \$1,702,759 in revenue, and our overall franchisees earned on average \$320,487 in revenue per territory.



The Role of a CarePatrol Franchise Owner

When a CarePatrol franchisee comes into contact with a family, they know time is of the essence. As trusted advisors, CarePatrol franchisees will outline the safest options for care, as well as what is most appropriate for their budget. Our proprietary software allows our franchise owners to present important background information,

such as performance and compliance reviews.

Our franchisees then physically take the families on a personalized tour of the communities, allowing them to see the places and meet with the health care professionals who will be taking care of their loved ones.

Our franchisees serve as the CEOs of their own companies, working to build meaningful relationships with the businesses and organizations who need their help. Our business model is all action-based: to generate interest in your business in the crucial months after you open, you need to go out in your community and network extensively. Senior living communities will pay you a commission for referring your clients to their locations.

Once an organization (say, a hospital case manager) refers you to a senior in need, you will use a personalized approach to help families in need. You will review their financial condition to determine what they can afford, what type of care they need, and lifestyle/preferences. You will lead families on tours, or provide them with a virtual tour.

You will provide seniors or their families with in-depth insight into how the locations function, as well as the care history, in order to help the families make the best decision for their loved ones.

Most importantly, it's a free service to families and seniors. This allows you to be a trusted resource in one of the most difficult decisions families ever have to make.

The ability to offer expert, personalized guidance is what sets CarePatrol apart. When a client needs the services of CarePatrol, they know their senior advisor will have: In-depth knowledge of the assisted-living communities in the local area

- Insight into assisted-living track records, level of care, performance reviews and more
- Ability to help families make informed decisions about where they are placing their loved ones
- Availability to tour assisted-living locations with the families to ensure that the families gain confidence in the level of care their loved ones will receive
- Availability to follow up with the families and the seniors in care to ensure that the community is meeting their needs

"One of the things I didn't count on when buying my CarePatrol territory was buying into a family. The CarePatrol system very much feels like a family. I have developed strong relationships with the other franchisees around my territory as well as many across the country. As an organization, CarePatrol is very open to change. We respond well to the needs of the families we work with and are able to adapt quickly to the changes that come to the marketplace. We truly have the best model for placement organizations in our industry."

Ron Culyer
Owner of CarePatrol of Cincinnati-SW Ohio

If you have the drive to help others and want a meaningful role in your community, CarePatrol may be the right franchise opportunity for you.

What Skills Do I Need to Franchise with CarePatrol?

We don't require any previous experience in the senior care or medical industries to franchise with CarePatrol. What we do require is:

- The desire to help others like they are your own family
- An outgoing personality capable of communicating effectively to others
- The desire to build relationships and network in your community
- The ability to speak in front of groups

- The need to own a business that makes a difference
- The desire to learn

"I believe the training and support provided by CarePatrol have been first rate. The company has done a great job providing its industry knowledge in the initial training week. It also continues to provide ongoing training and support through staff and new training products. The franchise system is always one step ahead of the marketplace. They continue to put franchisees in a position to stay ahead of the competition and provide the highest level of service to the client."

Rich Curry

Owner of CarePatrol of Albany, New York



Item 7

Financial Disclosure Document

TYPE OF EXPENDITURE	AMOUNT	METHOD OF PAYMENT	WHEN DUE	TO WHOM PAYMENT IS MADE
Initial Franchise Fee	\$20,000 - \$57,000	Lump Sum	Upon Execution of Franchise Agreement	CarePatrol
Onboarding Fee	\$10,000	Lump Sum	Upon Execution of Franchise Agreement	CarePatrol
Travel Expenses for Training	\$2,500 - \$5,000	As Incurred	As Incurred	Vendors
Real estate and Related Expenses	\$150 - \$200	As Incurred	As Incurred	Vendors
Office Equipment	\$1,100 - \$2,250	Lump Sum	Before opening	Vendors
Computer system	\$2,500 - \$3,750	As Incurred	Before opening	Vendors
Signs	\$0 - \$550	Lump Sum	Before opening	Vendors
Certified Senior Advisor Certification	\$1,495 - \$1,795	Lump Sum	When you Enroll	Society of Certified Senior Advisors
Professional fee & Business Licences	\$1,725 - \$2,725	As Incurred	As Incurred	Vendors
Vehicle (deposit & 3 lease payments)	\$0 - \$5,000	Installments	As Incurred	Suppliers
Insurance (3 - 6 months)	\$650 - \$2,500	As Incurred	As Incurred	Vendors
Additional funds (3-month period after opening)	\$20,000 - \$40,000	As Incurred	As Incurred	Various
TOTAL	\$60,120 - \$130,970			



How Will CarePatrol Support Me in My Business?

CarePatrol understands that the majority of entrepreneurs interested in owning a business that helps seniors and their families may not have any prior experience in this industry. This lack of experience is not an obstacle, because the only requirement to become an owner of a CarePatrol franchise is the desire to serve others and play a meaningful role in your community. CarePatrol's intensive training program empowers owners with the skill set needed to grow their businesses over the long-term and make a lasting difference in the communities they serve.

CarePatrol's training program is one of the most comprehensive in the entire industry. Over the

course of 8-12 consecutive weeks with two personal visits to your territory by your Regional Performance Coach, you will become the subject-matter expert in your community for times of deep emotional upheaval and stress.

Also, you will not grow your business alone. CarePatrol has national contracts with companies that help you grow your business and earn trust in your community. Another advantage is our proprietary software, which helps you quickly gather location data, which is especially important when families need to make the right decision fast.

What Will My Training Consist of?

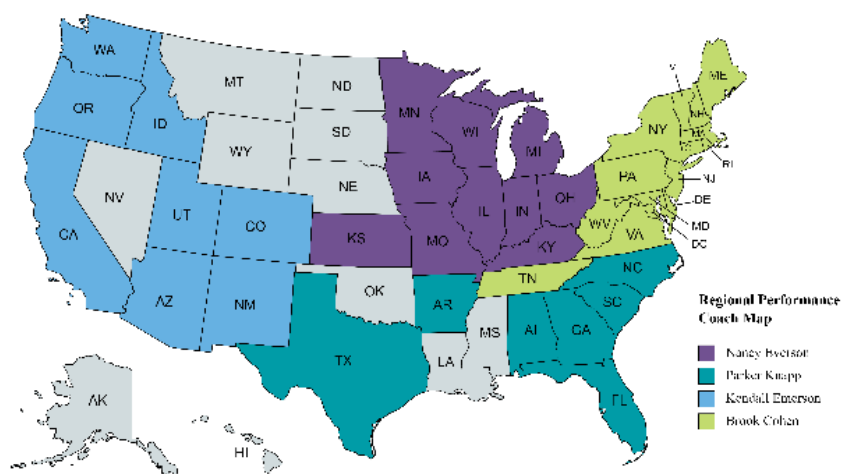
CarePatrol training for a new franchise owner consists of all the tools needed for success.

PHASE 1

Our eLearning program will prepare you as a subject-matter expert in senior placement within 6 weeks. You will understand the differences in medical options, what type of care is required for various medical circumstances, and how to judge and review assisted-living options using our proprietary software. We delve into topics like establishing and outfitting your business, marketing, operations, and understanding business metrics. Weekly foundational training check-ins will help set you up for success. You will receive your CSA or Certified Senior Advisor Certification by learning about The Journey of Aging, Health Transitions as People Grow Older, Quality of Life Choices for Older Adults, and Financial & Estate Planning for Seniors.

PHASE 2

Upon completion of Phase 1, there are six weeks of additional in-person training that will build upon your foundation. You will also deep dive into subjects like client process, documentation, identifying targets, sales training, referral development, accounting, presentation, and case studies. At the end of your remote education, you will have graduated from over 160 hours of learning.



To further educate and guide you after your initial training, you will have access to a Regional Performance Coach. This mentor will nurture your success by ensuring you are up-to-date on all operational, marketing and organizational resources created by our corporate team. Your coach will also inform you of regional industry updates and help answer any questions you may have.

In the case of Mike Awadalla, a franchisee in Walnut Creek, California, this access to a mentor creates the opportunity to learn best practices and solve problems as they arise.

"What I love about CarePatrol is that they create a family environment. We have a lot of franchisees in Northern California, and we are extremely close. We meet and exchange information, we help each other in our businesses."

Franchisee Testimonials

"I was looking for an opportunity and I learned about CarePatrol. It really hit home and resonated with me on a personal level. I thought, 'This is refreshing.' I can help people, educate families, advocate for the safety of seniors, advocate for consumers and help them make the best decision that fits their needs."

Anthony Coleman
Owner of a CarePatrol in North
Central, Ohio

"I was a restaurant owner with elderly parents and five children, and I was getting squeezed for time. My background was in microbiology, so going into CarePatrol is giving me an opportunity to learn about the science of aging. I love everything about it: there's much less stress, I have more time for the family, and it's extremely personally and financially rewarding."

Mike Awadalla
Owner of a CarePatrol franchise in
Walnut Creek, California

"I have nothing but praise for my fellow franchisees. To a person, I have received support, advice and encouragement from other CarePatrol franchisees to whom I have spoken. Much of the strength of this organization is derived through its franchisees."

Charles Picard
Owner of CarePatrol of
North Prince George's County

"One of my most important goals when I started a CarePatrol was that I wanted to find a way to be connected with my community. But, I also had financial goals and I've more than surpassed that goal. It's been amazing and I've been able to do that without sacrificing my personal life. I have time for my family and children. That has actually been enhanced."

Michelle Graf CSA, MBA
Owner of CarePatrol of
Green Bay



To learn more about franchising with CarePatrol, visit
americasgreatestfranchises.com

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