**{{ capitalize(brand) }}’s FDD Annual Renewal Questionnaire**

**Prepared For:** {{ users[0].name }}, {{ users[0].email }}

**Preferred Issuance Date:** {% if preferred %}{{ preferred\_issuance\_date }}{% else %}None.{% endif %}

|  |  |  |
| --- | --- | --- |
| **Item** | **Any changes?** | **Details** |
| 1 | Changes: {% if has\_item\_1\_changes %}Yes{% else %}No{% endif %} | {% if has\_item\_1\_changes %}{{item\_1\_changes\_details}}{% else %}N/A{% endif %} |
| 3 | Material civil actions: {% if material\_civil\_actions %}Yes{% else %}No{% endif %} | {% if material\_civil\_actions %}{{material\_civil\_actions\_details}}{% else %}N/A{% endif %} |
| Public agency injunctions, etc: {% if public\_agency\_injunctions %}Yes{% else %}No{% endif %} | {% if public\_agency\_injunctions %}{{public\_agency\_injunctions\_details}}{% else %}N/A{% endif %} |
| 4 | Bankruptcy filing: {% if bankruptcy\_filing %}Yes{% else %}No{% endif %} | {% if bankruptcy\_filing %}{{bankruptcy\_filing\_details}}{% else %}N/A{% endif %} |
| 5 | Rang of initial fees charged in the last fiscal year: {% if uniform %}Uniform{% else %}Not uniform{% endif %} | {% if not uniform %}{{fee\_and\_range}}{% else %}N/A{% endif %} |
| 6 | Required changes in fees: {% if required\_fee\_changes %}Yes{% else %}No{% endif %} | {% if required\_fee\_changes %}{{ required\_fee\_changes\_details }}{% else %}N/A{% endif %} |
| Intended changes in fees: {% if intended\_fee\_changes %}Yes{% else %}No{% endif %} | {% if intended\_fee\_changes %}{{ intended\_fee\_changes\_details }}{% else %}N/A{% endif %} |
| 7 | Any changes in Item 7? {% if has\_item\_7\_changes %}Yes{% else %}No{% endif %} | {% if has\_item\_7\_changes %}{{item\_7\_changes\_details}}{% else %}N/A{% endif %} |
| 8 | Any goods or services sold to franchisees? {% if goods\_services\_sold %}Yes{% else %}No{% endif %} | {% if goods\_services\_sold %} |
| {%tr for s in sale %} |
| {{ s.what }}  {{ currency(s.revenue) }} |
| {%tr endfor %} |
| Total: {{ currency(revenue\_total) }} |
| {% else %}  N/A  {% endif %} |
| Changes to unit or system operations? {% if unit\_system\_changes %}Yes{% else %}No{% endif %} | {% if unit\_system\_changes %}{{ unit\_system\_changes\_details}}{% else %}N/A{% endif %} |
| 11 | Active advertising fund? {% if active\_advertising\_fund%}Yes{% else %}No{% endif %} | {% if active\_advertising\_fund %}  Total Expense Amount: {{ currency(expense\_total\_amount) }}  Production: {{ production }}%  Media Placement: {{ media\_placement }}%  Administrative: {{ administrative }}%  Other: {{ other }}%, {{ other\_description }}  {% else %}N/A{% endif %} |
| 12 | Revisions or changes to how territory is determined? {% if territory\_determined\_changes %}Yes{% else %}No{% endif %} | {% if territory\_determined\_changes %}{{ territory\_determined\_changes\_details}}{% else %}N/A{% endif %} |
| Changes to protected (or exclusive) territory? {% if protected\_territory\_changes %}Yes{% else %}No{% endif %} | {% if protected\_territory\_changes %}{{ protected\_territory\_changes\_details}}{% else %}N/A{% endif %} |
| Changes to the rights reserved by the franchisor? {% if rights\_reserved\_changes %}Yes{% else %}No{% endif %} | {% if rights\_reserved\_changes %}{{ rights\_reserved\_changes\_details}}{% else %}N/A{% endif %} |
| 13 | Has registered any new trademarks? {% if registered\_new\_trademarks %}Yes{% else %}No{% endif %} | {% if registered\_new\_trademarks %}{{ registered\_new\_trademarks\_details}}{% else %}N/A{% endif %} |
| Would like to register additional trademarks? {% if wants\_new\_trademarks %}Yes{% else %}No{% endif %} | {% if wants\_new\_trademarks %}{{ wants\_new\_trademarks\_details}}{% else %}N/A{% endif %} |
| Aware of any current trademark infringements? {% if current\_trademark\_infringements %}Yes{% else %}No{% endif %} | {% if current\_trademark\_infringements %}{{ current\_trademark\_infringements\_details}}{% else %}N/A{% endif %} |
| 14 | Added any patents, copyrights, or additional proprietary information? {% if added\_patents\_copyrights %}Yes{% else %}No{% endif %} | {% if added\_patents\_copyrights %}{{ added\_patents\_copyrights\_details}}{% else %}N/A{% endif %} |
| 18 | Used any public figures? {% if public\_figures %}Yes{% else %}No{% endif %} | {% if public\_figures %}{{ public\_figures\_details}}{% else %}N/A{% endif %} |
| 20 |  | |
| {%tr if upload %} | |
| **Franchisees (Current/signed/former):** See attached. | |
| {%tr endif %} | |
| {%tr if current\_franchisee[0:] %} | |
| **Current Franchisees:** | |
| {%tr for j in current\_franchisee %} | |
| 1. {{ j.name }} {{ j.address.address }} {{ j.phone\_number }} | |
| {%tr endfor %} | |
| {%tr else %} | |
| **Current Franchisees:** None. | |
| {%tr endif %} | |
| {%tr if signed\_franchisee[0:] %} | |
| **Signed Franchisees:** | |
| {%tr for k in signed\_franchisee %} | |
| 1. {{ k.name }} {{ k.address.address }} {{ k.phone\_number }} | |
| {%tr endfor %} | |
| {%tr else %} | |
| **Signed Franchisees:** None. | |
| {%tr endif %} | |
| {%tr if former\_franchisee[0:] %} | |
| **Former Franchisees:** | |
| {%tr for l in former\_franchisee %} | |
| 1. {{ l.name }} {{ l.address.address }} {{ l.phone\_number }} {{ l.category }} | |
| {%tr endfor %} | |
| {%tr else %} | |
| **Former Franchisees:** None. | |
| {%tr endif %} | |
|  | |

**State Registrations:**

* {{ states.true\_values() }}.

{%p if has\_financials %}

**Financials:** See attached.

{%p else %}

**Financials:** Will email.

{%p endif %}

**Other Changes:** {% if has\_other\_changes %}{{ changes }}{% else %}None.{% endif %}

{%p if franchise\_seller[0:] %}

**Franchise Sellers:**

{%p for y in franchise\_seller %}

1. Franchise Seller

{{ y.name }}

{{ y.address.on\_one\_line() }}

{%p if y.employment[0:] %}

Employers

{%p for employment in y.employment %}

{{ employment.employer }}

{{ employment.position }}

{{ employment.start }}

{% if employment.present\_employer %}Present Employer{% else %}{{employment.end }}{% endif %}

{%p endfor %}

{%p else %}

No Employers

{%p endif %}

{%p if y.actions[0:] %}

Actions

{%p for actions in y.actions %}

{{ actions.party\_names }}

{{ actions.action }}

{{ actions.number }}

{%p endfor %}

{%p else %}

No Actions

{%p endif %}

{%p if y.convictions[0:] %}

Convictions and Liabilities

{%p for convictions in y.convictions %}

{{ convictions.party\_names }}

{{ convictions.action }}

{{ convictions.number }}

{%p endfor %}

{%p else %}

No Convictions or Liabilities

{%p endif %}

{%p if y.injunctions[0:] %}

Injunctions

{%p for injunctions in y.injunctions %}

{{ injunctions.person }}

{{ injunctions.court }}

{{ injunctions.number }}

{%p endfor %}

{%p else %}

No Injunctions

{%p endif %}

{%p endfor %}

{%p else %}

**Franchise Sellers:** None.

{%p endif %}