

Personal Business Advisor Relationship Disclosure

No law requires this disclosure, but we want to be sure to set your expectations about the professional advisory relationship you are entering into with Personal Business Advisors, LLC (hereinafter ‘PBA’).

While we are primarily compensated through successful matches resulting in transactions, our focus and interests lie with you, our senior executive client (hereinafter ‘Candidate’). While there is no fee to you, there are several interaction obligations on both of our parts to make this process successful.

PBA Advisor Obligations	Candidate Obligations
Always be in integrity, deal honestly and fairly with your best interests as our priority	Always be open, truthful & candid about yourself; provide clear communications
Keep all of your information confidential	Keep our shared business information confidential
Mutual time respect – show up on time for all scheduled calls & coordinate them for all parties	Mutual time respect - show up on time for all scheduled calls, notify us in advance of conflicts
Introduce you to our service & advise you through our investigational selection process	Be honest & complete with your personal preferences & capabilities for efficient & productive interaction
Complete all three calls of our preliminary process	Participate in all three calls of our process: First interview, Initial suggestions call, Follow-up call
Be prepared to make initial business opportunity suggestions based on your preferences	Sign and return the standard NDA to receive confidential information about business opportunities
Be prepared to tailor those suggestions based on your feedback	Provide clear, thorough, and honest feedback about suggestions to help PBA refine your specifications
Keep making suggestions until we find the ideal business ownership opportunity for you	Keep investigating our suggestions, providing feedback and specification refinement, or tell us right away if you realize that business ownership is really not for you
Support the conveyance of information about opportunities of interest, delivering documents, arranging phone calls, scheduling meetings	Study information provided, participate in conference calls, travel to meetings as needed to investigate and evaluate opportunities

Our matchmaking process involves a series of telephone interviews and discussions for gathering profile information and providing educational insights about industries and specific opportunities, as follows:

1st interview with your PBA Senior Advisor should be 20-30 minutes to identify your personal criteria for our search, including: geographical preference, strengths and capabilities, interests and hobbies, business environment preference, business size and stage, investment and working capital available, income requirements and expectations, among other components and characteristics you would love to have in your ideal business.

2nd interview will be conducted with your PBA Senior Advisor and a Corporate Partner or Research Specialist during which they will refine your specifications from the first interview and your resume, and they will present several suggestions of carefully selected opportunities that appear to be a good fit for you.

3rd and more interviews will be conducted by your Senior Advisor and Corporate Partner to determine the direction to proceed by a review of the opportunity offerings provided and an assessment about any offering you want to receive more information about, clarifying your readiness to meet the principals and undertake due diligence.

In consideration of PBA providing these advisory services, Candidate agrees that purchasing a business, franchise or taking any participation in a business involves risk which will be evaluated in due diligence by Candidate and Candidate’s own professional advisors. Candidate agrees that PBA is not responsible for their purchase decision and agrees to release PBA from all claims or demands in relation to any injury or loss incurred. Texas law governs this release and reference to PBA includes all directors, shareholders, employees and advisors of PBA.

To confirm your understanding of this disclosure, please sign and fax it back to PBA HQ at [fax] 210-568-4439

PRINTED NAME: _____

Executive Candidate Signature Date

Recommended by
Thomas Wolfgram
PBA Senior Advisor