

# FDD Management Guide

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### Sending, Receiving and Tracking Franchise Disclosure Documents (FDDs) in FRM

Franchisors can send, receive and track FDDs directly from within FRM, through a partnership with global document e-signature provider, SignRequest. FRM's FDD e-signature process is in maximum compliance with Federal Trade Commission (FTC) regulations regarding franchise disclosures. This guide explains how franchisors upload and manage FDDs.

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## Manage FDD Templates

#### Tagging E-Signature Templates

To upload your FDD to FRM, first open your document in Microsoft Word. You will use a series of tags to identify which fields should be completed.

For required fields, insert the tags below in the corresponding fields. A text tag is used for a variety of fields, such as franchise seller, names or entities.

Type/text/print	[[t 0 r:1]]
Signature	[[s 0 r:1]]
Date	[[d 0 r:1]]

For non-required fields, use these tags:

Type/text/print	[[t 0 r:0]]
Signature	[[s 0 r:0]]
Date	[[d 0 r:0]]

For an FDD with multiple signees, mark the first signature line as required: [[s|0|r:1]] and leave the other signature lines as not required: [[s|0|r:0]]. This concept applies to text fields, as well. Date fields are automated.

#### Tip: Do a test run of sending and signing your FDD to see if your tag placement should be adjusted.

After you've created your field tags, make sure to change all text color to white so they are hidden. If you skip this step, your recipient will receive an FDD with visible tags. Finally, save your PDF with an appropriate filename for your opportunities or contacts to see.

To upload your FDD to FRM from a PDF, open your document in a PDF editing software such as Adobe Acrobat DC. Create text fields on each line a recipient will fill in or sign. Remember to turn the text in the text boxes white.

NOTE: If you are using the free trial version of Adobe Acrobat DC, you will not be able to edit the document.





#### Uploading E-Signature Templates

To upload your tagged PDF, open FRM and navigate to Settings  $\rightarrow$  E-Signature Templates. Here you can create new e-signature document templates and edit or deactivate current templates.



Best Practice: De-activate outdated or unused templates instead of keeping them active or deleting them.

To upload a new FDD template, hit "New" at the top left and complete the required fields.



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These fields are only seen internally, except for the Abbreviation. Complete them as follows:

- Role: enter "Signee"
- Template Reference: type of document, such as "Franchise Disclosure Document"
- Abbreviation: this will be the name of the document the signee will see in the email invitation
- Title: type of document, such as "Franchise Disclosure Document"

Hit "Save" at the top left after completing these fields. Then, you will be able to upload an attachment in the Notes section at the bottom of the page. Upload the tagged PDF file, then hit "Save and Close."

To ask FRM to update Franchise Disclosure Documents, contact the FRM Support Team via the Client Support platform in FRM. Please include the untagged FDD(s) as an attachment and provide explicit instructions about which document(s) to upload and which to de-activate. To learn more about submitting support tickets through the Client Support system, <u>visit our Online Digital Library</u>.



### Send an FDD

Start with an Opportunity record. Scroll down to the "Key Dates" section to see if an FDD has been sent or received. If not, these dates will be blank. At the top of the Opportunity record, hit "Send Document" to initiate the send of the FDD.

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	Completed by Cassidy Ford Today	
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contect mo	Completed by Cassidy Ford Today	
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<ul> <li>Key Dates</li> </ul>		
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Dates	
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Application Received Date	1/15/2019
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olding Expiration Date	<b>■</b>
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Tip: To send an FDD to a current contact (like a franchisee) start in the Contacts view. Highlight the desired contact, then hit send document at the top.

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~	Full Name 🛧	Relationship Type Company	Email Mobile Pho		Owner	
	Alexis Price	Franchisee	alexis22@andersonrotn.com	909-222-0193	Stan Friedman	
	Alexis Smith	Prospect	alexis0@andersonroth.com	660-555-0112	Cassidy Ford	
	Alice Piper	Prospect	alice.piper@andersonroth (647) 548-6	972 (647) 548-6972	Cassidy Ford	
	Alicia Andersen	Prospect	alicia11@andersonroth.com	1 (11) 500 555-0122	Stan Friedman	
	Alicia Luo	Prospect	alicia4@andersonroth.com	1 (11) 500 555-0149	Cassidy Ford	
	Alicia Raje	Prospect	alicia12@andersonroth.com	1 (11) 500 555-0142	Mike Winburn	
	Alisha Andersen	Prospect	alisha37@andersonroth.com	1 (11) 500 555-0132	Cassidy Ford	
	Alisha Chander	Prospect	alisha40@andersonroth.com	1 (11) 500 555-0176	Mike Winburn	
~	Alisha Guo	Franchisee	alisha18@andersonroth.com	1 (11) 500 555-0174	Cassidy Ford	
	Alisha Li	Prospect	alisha3@andersonroth.com	1 (11) 500 555-0118	Cassidy Ford	
	Alisha Raji	Prospect	alisha46@andersonroth.com	771-555-0191	Stan Friedman	
	Alison Chande	Prospect	alison@andersonroth.com	1 (11) 500 555-0110	Cassidy Ford	

FRM is designed to accommodate multiple brands and multiple FDDs, for instance, state-specific disclosures. When you hit "Send Document," a window will pop up prompting you to verify the details of the document you want to send, and choose which FDD will be sent. Clicking on the field to select the desired document leads to a Look Up Record with various documents to choose from. Once you hit "Add" in this window, it will disappear. Now click "Finish" in the original dialog box.

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ote: Emails will be queued up and may take a few minutes to be created and/or delivered.		Look Up Record	×
select the person(s) to receive the document * Thomas Carter;		Select Enter your search criteria.	
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		1 - 3 of 3 (1 selected) H	≪ Page 1 ≽
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When you hit "Finish," an automated email is sent to the opportunity or contact containing instructions on how to sign the FDD. On the Opportunity and Contact records, notice this email is recorded in the

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Activity Feed. The same email is delivered every time an FDD is sent, based on a standard email template. FRM can customize the template to your brand.

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prafts	Cassidy Ford has sent you a	Franchise Disclosure Document to sign.	
Previous Emails			
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#### **Disclosing Multiple Parties**

To send a document to multiple parties, follow the same steps above, either by selecting multiple contacts in the Contacts view, or using the opportunity look-up to select multiple recipients. For example:



FRM - S	end Document [	Dialog - Google Chrome	-		FRM - Send Document Dialog - Google Chrome	- C	) X
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Thom					Thomas Carter ; Abigail Foster ; Abby Raman ; Abby Mehta ;		Q
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### Sign an FDD

Opportunities or candidates are required to follow a 3-step process to ensure full compliance with FTC regulations. When a signee clicks the link provided in the email invitation, he's led directly to a site containing the 3-step instructions. He cannot proceed from step to step until the previous task has been completed.

AR	
ANDERSON ROTH	Our Story Why Anderson Roth Growth Opportunity FAQs Login
1. Download Document	
Before you can sign the documen	nt, you must download the electronic PDF to verify receipt.
Download document	
2. Verify Downloaded Document	
To verify the document was down	loaded, please browse to select the document on your computer, then press the Verify button.

#### Step 1: Download the FDD

The signee must download the disclosure document prior to signing by clicking "Download Document." Different browsers and operating systems download and manage files in different ways. For browser instructions refer to the following links: <u>Chrome</u>, <u>Firefox</u>, <u>Internet Explorer</u>.



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#### Step 2: Verify the Download

The next step is to verify the signee has actually received the document. After downloading the FDD, he must upload the same document to be verified. He clicks "Choose File," this will open a dialog to the recently downloaded FDD that can be selected for upload.

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	3. Sign	Document Rec	elpt				

Once the file is uploaded, the opportunity or contact clicks "Verify." A message will appear indicating the document is verified, and a SignRequest window will be generated under the section below to allow him to sign the FDD. If an incorrect file is uploaded, a message saying "Document Not Verified" will pop up and the signee will not be able to proceed.



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3. Sign Document Your document is still being prepared. Please t	try again in a few minutes.					

#### Step 3: Sign the FDD

Now the signee can access the SignRequest window. He is prompted to read the document before scrolling down to sign it. Click on the blue arrow to jump to the next signature line.



Now the opportunity or contact completes any open fields and signs, following the SignRequest prompts. This is compatible with desktop, phone or tablet.



			Options Finalize
+	Anderson Roth Steakhouse, LLC authorizes the ag process for it in the particular state. I have received a Disclosure Document dated May 1 Attachments: Exhibit A Anderson Roth Standard Contracts Exhibit B List of Agents for Service of Process Exhibit C List of State Administrators Exhibit C List of State Administrators Exhibit E Financial Statements May 20, 2020 Date Disclosure Document Received Entity Forme Signature TO BE RETURNED TO:		nibits and other
	Anderson Roth, LLC 3400 Peachtne Road NE, Suite 340 Atlanta, Georgia 30326		
		help?	



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bit D List c Form bit E Finan		<sup>C</sup> Thomas Carter	c Agreement	
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er Steaks, LLC	Thomas Carter	Thomas Carter		
10	Thomas Carter	Thomas Carter		
t Name	Thomas Carter	Thomas Carter		
E RETURNED TO rison Roth, LLC Peachtree Road NE, : ta, Georgia 30326	ancel	Save & insert		
	t Name	Thomas Carter Thomas Carter Thomas Carter Thomas Carter Thomas Carter Cancel	Thomas Carter Thomas Carter I Name Thomas Carter Thomas Carter E RETURNED TO mon Roda LLC Practices Read NE Cancel Symbolic	Thomas Carter Sweekineet





		(0)	Options Finalize
+	Anderson Roth Steakhouse, LLC authorizes the age process for it in the particular state. I have received a Disclosure Document dated May 15, Attachments: Exhibit A Anderson Roth Standard Contracts Exhibit B List of Agents for Service of Process Exhibit C List of State Administrators Exhibit D List of Franchise Owners and Former Franchisees Exhibit E Financial Statements May 20, 2020 Date Disclosure Document Received Carter Steaks, LLC Entity Signature	ded the following Exhibits ar Parent Guaranty Table of Contents to Mar Franchisee Corr Questionnaire State-Specific Dis Addenda	id other
	Tomas Carter Print Name TO BE RETURNED TO: Anderson Roth. LLC 3400 Peachtree Road NE, Suite 340 Atlanta, Georgia 30326		





When he clicks "Submit," a confirmation message appears.



# Tracking FDDs

Every time an FDD is signed, the owner of the Opportunity receives an immediate email alert. He can click the link to be taken directly to the Opportunity record.

FDD has been signed by Skylar Moore	CO PIM
Phane     Delete Archive     Reply     Reply     Reply formating (how how how how how how how how how how	09 PM
CF Cassidy Ford «cford@fmsolutions.com» Center/Text S FDD has been signed by Skylar Moore S	09 PM
PUU nas been signed by skylar widore	
	~
FDD has been signed by Skylar Moore for opportunity named Skylar Moore.	
sourne accessingliera un angen more ser opportaney innica angen mores.	
https://demoils.fmsolutions.com.443/main.aspa?etc=3&id=c20ceflb-7flacef11.80c2-000d3a17631e8histKer9538742768newWindow=true&pasertspe=entithercord	
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At the bottom of the Opportunity record, under the "Key Dates" section, the FDD tracking fields have now been auto-populated with the corresponding dates. The "Holding Expiration Date" is calculated based on 15 days, including the day the FDD was sent.

Dates				
Last Contact Date	⋒ 1/17/2019	Next Contact Date		
Application Date	1/15/2019	Lead Date	<b>₽</b>	
Application Received Date	1/15/2019	Created On	☐ 1/17/2019 12:41 PM	
FDD Sent Date	⋒ 1/17/2019	Actual Close Date		
FDD Signed Date	⋒ 1/17/2019	Develop Proposal	No	
Holding Expiration Date	⋒ 1/31/2019	Business Plan	No	
Background Check Start Date		Store Visit	No	
Background Check Completed Date		Corporate Documents Received	No	
Background Check Passed Date				

More detailed tracking information can be found in the FRM E-Signature Document section, which can be accessed two ways: via the individual Opportunity record, which brings you to an individual document record, or the main Franchise Sales menu, which leads to a pipeline view.

Navigating from the Opportunity record, click the down-arrow next to the opportunity's name in the bar at the top of the screen. Find "E-Signature Documents."

🔀 📄 Franchise Sales   🗸 Opportunities   🗸 Thomas Carter	-	🕑 🕢 Search LRM data 🔎 🖙 Canaldy Ford
Common Process Sessi	ons	
Documents Contacts Audit Histo	ny .	
Activities Stage Tracking C Process Ses	-	
Closed Activities Trip Campaigns 🚱 Background	Processes	
Forms Contacts		
Candidate Steps Opportunity Commiss		
E-Signature Documents		
Type * New Stape 3 - Qualifying	Cassidy Ford has sent you a AR FDD Amended to sign! AR006090 5/20/2020 4:04 PM	No Contact records found.
Status Reason B In Progress Tembory of Interest 1 Manhattan, NY Tembory of Interest 2 Queens, NY	Cassidy Ford Cassidy Ford has sent you a AR FDD Amended to sign? AR006088 5/02/2020 J35 FM	
Territory of Interest 3 Description	Cassidy Ford Cassidy Ford has sent you a AR FDD Amended to sign! AR000087 5/20/2020 3:20 PM	
	Thomas Carter Phone Call Completed by Cassidy Ford 5/14/2020 10:18 AM	Pastar
Contact Info	Castidy Ford has a FDD to signif AR00000 5/13/200 12:03 PM	
First Name * Thomas Lost Name * Carter	FDD Review Due Date: \$152020 1000 AM	
Enal frmfan2@gmail.com	Due Date 5/15/2020 10:00 AM	
Address 1 5246 Central Ave Manhattan, New York 58471 United States		
& Business Phone 420-555-0161		The person of the courses
Mobile Phone		1 to the state

This next view shows the details of any FDDs you may have sent this candidate. The view, like any view in FRM, is customizable. A drop-down menu allows you to choose other types of views for that particular candidate like active, inactive, sent and signed FDDs.



Franchise	Sales   V Opp	ortunities 🖌 Thomas Carter		🕒 🕣 Search C.R.M. data	Cassidy Ford Anderson Roth	
						↑ ↓
PORTUNITY : OPPORTUNITY 201:	5					
homas Cart	er •≡			Stage 3 - Qualifying	Potential Customer* Est. Revenue Thomas Cart r \$35,000.00	Est. Clos 7/1/202
				1	1-	1
-Signature Docu	iments As	sociated View ~			Search for records	
5		SOCIATED VIEW ~ remplates - 🔍 export e-signat	URE D   •		Search for records	
5	ORT • 🚺 EXCEL 1		JRE D · ·		Search for records	
CHART PANE - 🖻 RUN REP	ORT - 🚺 EXCEL 1 Sent By	TEMPLATES + 🔍 EXPORT E-SIGNAT	Status Reason		Search for records	
CHART PANE - RUN REP	DRT - DRT EXCEL 1 Sent By d Cassidy Ford	TEMPLATES ▼ 🛱 EXPORT E-SIGNAT	Status Reason		Search for records	
CHART PANE - RUN REP Name Document Thomas Carter /_ AR FDD Amen	ORT - DRT EXCEL 1 Sent By d Cassidy Ford d Cassidy Ford	EMPLATES ▼ 0, EXPORT E-SIGNAT Sent On ↑ Signed On 5/20/2020 3:37 5/20/2020 7:45	Status Reason Signed		Search for records	
CHART PANE * RUN REP Name Document Thomas Carter /- AR FDD Amen Thomas Carter /- AR FDD Amen	ORT - DRT EXCEL 1 Sent By d Cassidy Ford d Cassidy Ford	TEMPLATES ▼	Status Reason		Search for records	
CHART PANE * DOCUMENT Name Document Thomas Carter /_ AR FDD Amen Thomas Carter /_ AR FDD Amen Thomas Carter /_ AR FDD Amen	DRT - EXCEL 1 Sent By d Cassidy Ford d Cassidy Ford d Cassidy Ford	Sent On A         Signed On           5/20/2020 337         5/20/2020 745           5/20/2020 321         5/20/2020 745	Status Reason Signed Sent Sent Sent		Search for records	
CHART PAINE * DRUIN REP Name Document Thomas Carter /_ AR FDD Amen Thomas Carter /_ AR FDD Amen Thomas Carter /_ AR FDD Amen Thomas Carter /_ AR FDD Amen	DRT - Sent By Sent By d Cassidy Ford d Cassidy Ford d Cassidy Ford Cassidy Ford	TEMPLATES • <b>đ</b> , EXPORT E-SIGNAT Sent On , Signed On 5/20/2020 337 5/20/2020 7.45 5/20/2020 321 5/18/2020 105 5/18/2020 104	Status Reason Signed Sent Sent Sent		Source for records	

Double-click the desired record to view time and date stamps of various actions. Certain actions are also automatically recorded in the "Notes" section, or you can manually add notes.



A physical copy of the executed FDD is recorded as an attachment in the "Notes" section. This is a PDF file delivered from SignRequest which contains the entire FDD. A second attachment is saved with the Signature Certificate with secure details about the electronic signature.

DTES		
ter a note		
ocument signature receipt at 5/20/2020 8:45:03 PM (UTC)		
signed_d4a06ab2-d99a-ea11-80d5-000d3a1710ff.pdf		
lemo Admin - 5/20/2020 3:49:21 PM		
Ocument signed at 5/20/2020 8:45:03 PM (UTC)		
signed_d4a06ab2-d99a-ea11-80d5-000d3a1710ff.pdf		
lemo Admin - 5/20/2020 3:49:20 PM		
enio Admini - 5/20/2020 5/45/20 PM		
Ocument signed at 5/20/2020 8:45:03 PM (UTC)		



This Disclosure Document summarizes certain provisions of the franchise agreement and other information in plain language. Read this Disclosure Document and all agreements carefully.         If Anderson Roth Steakhouse, LLC offers you a franchise, it must provide this Disclosure Document to yot 4 calendar-days before you sign a binding agreement with, or make a payment to, the franchise or or affiliate in connection with the proposed franchise sele of any binding franchise or other agreement or the payment of any consideration, whichever occurs first.         If Anderson Roth Steakhouse, LLC does not deliver this Disclosure Document on time or if it contains false or misleading statement, or a material omission, a violation of federal law and state law may have occurred and should be reported to the Federal Trade Commission, Washington, D.C. 20580 and your state agency (identified on Exhibit B).         The franchisor is Anderson Roth Steakhouse, LLC, 3400 Peachtree Rd. NE, Suite 340, Atlanta, Georg 30326, and its telephone number is (770) 555-6527.         Issuance Date: May 15, 2020.         The franchise seller for this offering and telephone number is (770) 55-6527. Additional franchise seller involved in this franchise offering and telephone number is (770) 55-6527. Additional franchise seller involved in this franchise offering and telephone number is (770) 55-6527. Additional franchise seller involved in this franchise offering and telephone number is (770) 55-6527. Additional franchise address is 3400 Peachtree Rd. NE Suite 340, Atlanta, Georgia 30328 and telephone number is (770) 55-6527. Additional franchise address is additional franchise address is additional franchise seller involved in this franchise offering and telephone number is (770) 55-6527. Additional franchise address is 3400 Peachtree Rd. NE Suite 340, Atlanta, Georgia 30328 and t		(to be returned to Anderso		use, LLC)	
14 calendar-days before you sign a binding agreement with, or make a payment to, the franchisor or a affiliate in connection with the proposed franchise sale of any binding franchise or other agreement or the payment of any consideration, whichever occurs first.  If Anderson Roth Steakhouse, LLC does not deliver this Disclosure Document on time or if it contains false or misleading statement, or a material omission, a violation of federal law and state law may have occurred and should be reported to the Federal Trade Commission, Washington, D.C. 20580 and your state agency (identified on Exhibit B).  The franchisor is Anderson Roth Steakhouse, LLC, 3400 Peachtree Rd. NE, Suite 340, Atlanta, Georg 30326, and its telephone number is (770) 555-6527.  Issuance Date: May 15, 2020.  The franchise seller for this offering a Anderson Roth Steakhouse, LLC, whose address is 3400 Peachtree Rd. N. Suite 340, Atlanta, Georgia 30328, and telephone number is (770) 55-6527. Additional franchise selle involved in this franchise offering a Index on the Atlanta, Georgia 30328, and telephone number is (770) 55-6527. Additional franchise selle involved in this franchise offering a Index on the Atlanta, Georgia 30328, and telephone number is (770) 55-6527. Additional franchise selle involved in this franchise offering a Index on the Atlanta, Georgia 30328, and telephone number is (770) 55-6527. Additional franchise selle involved in this franchise offering a Index on the Atlanta, Georgia 30328, and telephone number is (770) 55-6527. Additional franchise selle involved in this franchise offering a Index on the Atlanta (Georgia 30328, and telephone number is (770) 55-6527. Additional franchise selle involved in this franchise offering a Index on the Atlanta (Georgia 30328, and telephone number is (770) 55-6527. Additional franchise contracts Contracts Contracts Contracts Contracts to Manual Contracts Interviewe Inte					ther informatio
false or misleading statement, or a material omission, a violation of federal law and state law may has occurred and should be reported to the Federal Trade Commission, Washington, D.C. 20580 and your state agency (identified on Exhibit B). The franchisor is Anderson Roth Steakhouse, LLC, 3400 Peachtree Rd. NE, Suite 340, Atlanta, Georg 30326, and its telephone number is (770) 555-6527. Issuance Date: May 15, 2020. The franchise seller for this offering is <u>Anderson Roth Steakhouse, LLC</u> , whose address is 3400 Peachtree Rd. N Suite 340, Atlanta, Georgia 30328, and telephone number is (770) 55-6527. Additional franchise seller involved in this franchise offering a <u>Inderson Roth Steakhouse, LLC</u> authorizes the agencies identified on Exhibit B to receive service process for it in the particular state. I have received a Disclosure Document dated May 15, 2020 that included the following Exhibits and oth Attachments: <u>Exhibit A Anderson Roth Standard Exhibit F Parent Guaranty</u> Exhibit A Anderson Roth Standard Exhibit H Franchisee Compliane Exhibit B List of Agents for Service of <u>Process</u> Exhibit I State-Specific Disclosu Addenda Exhibit I State-Specific Disclosu Addenda Exhibit I State-Specific Disclosure Addenda Exhibit I E Financial Statements May 20, 2020 Date Disclosure Document Received Carter Steak, LLC Entity <u>Signature</u> <u>Thomas Carter</u>	14 calendar- affiliate in co	days before you sign a binding agreement nnection with the proposed franchise sal	ent with, or make e of any binding	e a payment to, the f	ranchisor or a
30326, and its telephone number is (770) 555-6527.  Issuance Date: May 15, 2020. The franchise seller for this offering a Suite 340, Atlanta, Georgia 30328, and telephone number is (770) 5 55-6527 Additional franchise selle involved in this franchise offering a Field of the telephone number is (770) 5 55-6527 Additional franchise selle process for it in the particular state.  Anderson Roth Steakhouse, LLC authorizes the agencies identified on Exhibit B to receive service process for it in the particular state.  I have received a Disclosure Document dated May 15, 2020 that included the following Exhibits and oth Attachments:  Exhibit A Anderson Roth Standard Exhibit G Table of Contents to Manual Contracts Exhibit G Table of Contents to Manual Contracts Exhibit I State-Specific Disclosu Exhibit C List of State Administrators Exhibit C List of State Administrators Exhibit E Financial Statements  May 20, 2020 Date Disclosure Document Received Carter Steaks, LLC Entity Thomas Carter	false or misle occurred and	eading statement, or a material omission I should be reported to the Federal Trade	n, a violation of	federal law and state	law may hav
The franchise seller for this offering Suite 340, Atlanta, Georgia 30328 and telephone number is (770) 535-6527 Additional franchise selle involved in this franchise offering a intervention of the telephone number is (770) 535-6527 Additional franchise selle inplicable).         Anderson Roth Steakhouse, LLC authorizes the agencies identified on Exhibit B to receive service process for it in the particular state.         I have received a Disclosure Document dated May 15, 2020 that included the following Exhibits and oth Attachments:         Exhibit A       Anderson Roth Standard         Exhibit B       List of Agents for Service of Process         Process       Exhibit H         Franchise of State Administrators       Exhibit I         State-Specific       Disclosure Document Received         May 20, 2020       Date Disclosure Document Received         Garter Steaks, LLC       Entity         Signature       Thomas Carter			3400 Peachtree	Rd. NE, Suite 340, A	tianta, Georg
The franchise seller for this offering Suite 340, Atlanta, Georgia 30328 and telephone number is (770) 535-6527 Additional franchise selle involved in this franchise offering a intervention of the telephone number is (770) 535-6527 Additional franchise selle inplicable).         Anderson Roth Steakhouse, LLC authorizes the agencies identified on Exhibit B to receive service process for it in the particular state.         I have received a Disclosure Document dated May 15, 2020 that included the following Exhibits and oth Attachments:         Exhibit A       Anderson Roth Standard         Exhibit B       List of Agents for Service of Process         Process       Exhibit H         Franchise of State Administrators       Exhibit I         State-Specific       Disclosure Document Received         May 20, 2020       Date Disclosure Document Received         Garter Steaks, LLC       Entity         Signature       Thomas Carter	Issuance Dat	te: May 15, 2020.			
process for it in the particular state. I have received a Disclosure Document dated May 15, 2020 that included the following Exhibits and oth Attachments: Exhibit A Anderson Roth Standard Contracts Exhibit F Parent Guaranty Exhibit B List of Agents for Service of Process Exhibit C List of State Administrators Exhibit C List of State Administrators Exhibit F Financial Statements  May 20, 2020 May 20, 2020 Date Disclosure Document Received Carter Steaks, LLC Entity Thomas Carter	Suite 340, Al	tlanta, Georgia 30328, and telephone nu		5-6527 Additional fr	
Attachments:       Exhibit A       Anderson       Roth       Standard       Exhibit F       Parent Guaranty         Exhibit A       Anderson       Roth       Standard       Exhibit G       Table of Contents to Manual         Exhibit B       List of Agents for Service of       Franchisee       Compliant         Process       Exhibit H       Franchisee       Compliant         Exhibit C       List of State Administrators       Exhibit I       State-Specific       Disclosu         Addenda       Exhibit F       Financial Statements       Exhibit J       State-Specific       Agreeme         May 20, 2020       Date Disclosure Document Received       Carter Steaks, LLC       Entity       Signature         Thomas Carter       Thomas Carter       State       State       State       State			encies identified	d on Exhibit B to rec	eive service
Exhibit A       Anderson       Roth       Standard       Exhibit F       Parent Guaranty         Exhibit A       Contracts       Exhibit G       Table of Contents to Manual         Exhibit B       List of Agents for Service of       Exhibit H       Franchisee       Compliand         Process       Process       Exhibit H       Franchisee       Compliand         Exhibit C       List of State Administrators       Exhibit I       State-Specific       Disclosu         Exhibit D       List of Franchise Owners and Former Franchisees       Exhibit J       State-Specific       Agreeme         Exhibit F       Financial Statements       May 20, 2020       Date Disclosure Document Received       Adenda         Carter Steaks, LLC       Entity       Signature       Signature       Thomas Carter			5, 2020 that inclu	uded the following Ex	hibits and oth
Contracts Exhibit H Franchisee Compliant Exhibit B List of Agents for Service of Process Exhibit C List of State Administrators Exhibit D List of Franchisee Owners and Former Franchisees Exhibit E Eipancial Statements May 20, 2020 Date Disclosure Document Received Carter Steaks, LLC Entity Thomas Carter					
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Exhibit C List of State Administrators Exhibit D List of Franchise Owners and Former Franchisees Exhibit E Eipancial Statements May 20, 2020 Date Disclosure Document Received Carter Steaks, LLC Entity Signature	Exhibit B		Exhibit I		Disclosu
Former Franchisees Amendments Exhibit E Financial Statements May 20, 2020 Date Disclosure Document Received Carter Steaks, LLC Entity Signature Thomas Carter			Exhibit I	Addenda	Acrosmo
May 20, 2020 Date Disclosure Document Received Carter Steaks, LLC Entity Signature Thomas Carter		Former Franchisees	Exhibit J		Agreeme
Date Disclosure Document Received Carter Steaks. LLC Entity Signature Thomas Carter	Exhibit E	Einancial Statements			
Carter Steaks. LLC Entity Signature Thomas Carter					
Entity Signature Thomas Carter	Date Disclos	ure Document Received			
Signature Thomas Carler		rc			
Thomas Carter	Entity				
Thomas Carler	200	29			
	Signature				
Phil Name					
TO BE RETURNED TO: Anderson Roth, LLC	Print Name				



SignRequest	Signing Log
Document ID: W6145QK4	
Anderson Roth	
Document name:	SignRequestDocument.aspx? org=AndersonRoth&esig=d4a06ab2-d99a- ea11-80d5-000d3a1710ff&SignRequest=1 SHA256 security hash:
Created on:	c2761da5d14d0219fd8d181fab01fd8c3a066058de92d6e7dc8a8bba9b11796 May 20, 2020, 8:37 p.m. (UTC)
Eric Stoll (estoll@arke.com)	
Email address verification:	Verified by SignRequest
Thomas Carter (frmfan2@gmail.com)	
Email address verification:	Verified by Anderson Roth Important! The email address has not been verified by SignRequest, but the user was identified by the application of Anderson Roth. The unique identifier of the declared logged in user is: 82d52b73-2595-ea11-80d5-000d3a1710ff
Signature added, page 6:	DORO
Text added, page 6:	May 20, 2020
Text added, page 6:	Thomas Carter
Text added, page 6:	Carter Steaks, LLC
Text added, page 6:	Anderson Roth Steakhouse, LLC
IP address:	104.54.214.203
User agent:	Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/ 537.36 (KHTML, like Gecko) Chrome/83.0.4103.61 Safari/ 537.36
Document signed:	May 20, 2020, 8:45 p.m. (UTC)



To manage all FDDs at a high level, click the down-arrow next to "Franchise Sales" in the bar at the top of the screen, and find "E-Signature Documents."

2 =	Franchise Sales 🐱 Opportuniti	es 🛛 👻 Thomas Carter 🗎 🛩	🕑 😧 Search CRM data 🔎 🕼 Casaddy Ford Audemon Noth
ranchise Sales	Forms/Documents	General	
Co Leads	Forms	Dashboards	
Opportunities	E-Signature Docum	ents 😥 Activities	
Contacts		Calendar	
Territory Reque	sts	Reports	
		Мар	
	United States		$\Theta$
🕻 Business Phone	420-555-0161		New York
🕻 Mobile Phone	**		
🕅 Company			Persey City ▶ Bing. Bipokiym Bipokiym 2 the source state and the source of the sourc
Forecast Information			
Est. Revenue	\$35,000.00		
Est. Close Date	7/1/2020		
Source Campaign	AndersonRoth Website		
Lead Source	Web Search		
Broker			
Probability (%)	75		
Rating	Hot		
Number of Units	2 US Dollar		
Currency*			

This view shows Active E-Signature Documents, but as with any module or section of FRM, you can pin your default view. System Views can be accessed in the drop-down menu, or you can create a personal view. Here you can manage all FDDs sent and see at a glance where each opportunity or contact is in the process of signing his or her FDD.

Franchise Sales	<ul> <li>E-Signature Docum</li> </ul>						(© ⊕	Search CRM data	
DIT 🚔 ASSIGN 📿 SHARE 🖚 EM	AIL A LINK 🛛 👻 👶 RUN WO	RKFLOW E START DIALO	G 🕑 RUN REPORT	EXCEL TEMPLATES	- 🗊 WORD TEMP	LATES - +++			
Active E-Signature	Documents ×						Se	arch for records	
System Views									
Active E-Signature Documents	Contact	Opportunity	Status Reason	Sent On	Downloaded On	Verified On	Signed On		
Inactive E-Signature Documents	Thomas Carter	Thomas Carter	Signed	5/15/2020 8:31 AM		5/15/2020 12:41 PM	5/15/2020 12	542 PM	
Sent E-Signature Documents	Monica Arun		Sent	5/15/2020 8:23 AM					
Signed E-Signature Documents Create Personal View	John Hancock	John Hancock	Sent	5/14/2020 11:31 AM					
Save Filters as New View	John Hancock	John Hancock	Sent	5/14/2020 11:15 AM		5/14/2020 3:26 PM			
Save Filters to Current View	Monica Arun	Monica Arun	Signed	5/14/2020 8:43 AM		5/15/2020 12:26 PM	5/15/2020 12	27 PM	
5/14/2020 8:42 AM AR FDD	Monica Arun	Monica Arun	Signed	5/14/2020 8:42 AM			5/14/2020 12	:45 PM	
5/13/2020 12:24 PM AR FDD	Kendra Navarro	Kendra Navarro	Sent	5/13/2020 12:24 PM					
5/13/2020 12:18 PM AR FDD	Brian Poff	Brian Poff	Signed	5/13/2020 12:18 PM			5/13/2020 4	19 PM	
5/13/2020 12:14 PM AR FDD	Brian Poff	Brian Poff	Sent	5/13/2020 12:14 PM					
5/13/2020 9:40 AM AR FDD	Thomas Carter	Thomas Carter	Sent	5/13/2020 9:40 AM	5/13/2020 12:03 PM	5/13/2020 12:04 PM			
5/13/2020 9:32 AM AR FDD	Thomas Carter	Thomas Carter	Sent	5/13/2020 9:32 AM					
5/12/2020 7:53 AM AR FDD	Gil Rodriguez	Gil Rodriguez	Sent	5/12/2020 7:53 AM					
5/12/2020 5:48 AM AR FDD	Gil Rodriguez	Gil Rodriguez	Signed	5/12/2020 5:48 AM			5/12/2020 12	15 PM	
12/30/2019 12:22 PM AR FDD	Chris Spears		Signed	12/30/2019 12:22 PM	12/30/2019 12:23 PM	12/30/2019 12:24 PM	12/30/2019 12	25 PM	
12/4/2010 10:12 414 49 500	Can Matthews	Con Mattheway	Canad	12/4/2010 10.12 444	12/4/2010 12 42 014	12/4/2010 12 44 044	12/1/2010 11		



#### Tracking Multiple Disclosures

When managing disclosures to multiple parties, the documents are tracked on different records.

1. Send to 2 Opportunities—sent from Opportunity #1

	Opportunity 1 Disclosure	Opportunity 2 Disclosure
Opp #1 Activity Feed	X	
Opp #2 Activity Feed		Х
Opp #1 e-signature View	Х	
Opp #2 e-signature View	Х	Х
Opp Contact #1 Activity Feed	Х	
Opp Contact #1 e-signature View	Х	
Opp Contact #2 Activity Feed		Х
Opp Contact #2 e-signature View		X

2. Send to 1 Opportunity and 1 Contact—sent from Opportunity

	Opportunity Disclosure	Contact Disclosure
Opp Activity Feed	Х	
Opp e-signature View	Х	
Opp Contact Activity Feed	Х	
Opp Contact e-signature View	Х	
Contact Activity Feed		Х
Contact e-signature View		Х

3. Send to 2 Contacts—sent from Contacts view

	Contact #1	Contact #2
	Disclosure	Disclosure
Contact #1 Activity Feed	Х	
Contact #1 e-signature View	Х	
Contact #2 Activity Feed		Х
Contact #2 e-signature View		Х

IMPORTANT: Only send bulk disclosures that include Opportunities if you want to track all disclosures on the Opportunity record.



#### Dashboards

To view a dashboard tracking all your FDDs, open the Franchise Sales drop-down menu and select "Dashboards." In the dashboard view filter, find and select "Sales:

= Fran	nchise Sales	E-Signature Docum	1   •						🕑 🕣 Search CRM data	Q	Cassidy Ford Anderson Roth	0
chise Sales	Form	s/Documents	General									
Leads		Forms	Dashboards									
Opportunities		E-Signature Documents	Activities									
opportunities	1	e-signature Documents	=									
Contacts			Calendar									
Territory Requests			Reports									
			<b>О</b> Мар									
5/18/2020 10:41 AM	R FOO	Thomas Carter	Thomas Carter	Sent	5/18/2020 10:41 AM		5/18/2020 2:42 PM					
5/15/2020 8:31 AM	R FDD	Thomas Carter	Thomas Carter	Signed	5/15/2020 8:31 AM		5/15/2020 12/41 PM	5/15/2020 12:42 PM				
5/15/2020 8:23 AM A	IR FOO	Monica Arun		Sent	5/15/2020 8:23 AM							
5/14/2020 11:31 AM A	IR FOD	John Hancock	John Hancock	Sent	5/14/2020 11:31 AM							
5/14/2020 11:15 AM	ir foo	John Hancock	John Hancock	Sent	5/14/2020 11:15 AM		5/14/2020 3:26 PM					
5/14/2020 8:43 AM A	IR FOO	Monica Arun	Monica Arun	Signed	5/14/2020 8:43 AM		5/15/2020 12:26 PM	5/15/2020 12:27 PM				
5/14/2020 8:42 AM A	IR FOD	Monica Arun	Monica Arun	Signed	5/14/2020 8:42 AM			5/14/2020 12:45 PM				
5/13/2020 12:24 PM A	R FDD	Kendra Navarro	Kendra Navarro	Sent	5/13/2020 12:24 PM							
5/13/2020 12:18 PM A	IR FDD	Brian Poff	Brian Poff	Signed	5/13/2020 12:16 PM			5/13/2020 4:19 PM				
5/13/2020 12:14 PM A	R FOD	Brian Poff	Brian Poff	Sent	5/13/2020 12:14 PM							
5/13/2020 9:40 AM	R FDD	Thomas Carter	Thomas Carter	Sent	5/13/2020 9:40 AM	5/13/2020 12:03 PM	5/13/2020 12:04 PM					
5/13/2020 9:32 AM	IR FOD	Thomas Carter	Thomas Carter	Sent	5/13/2020 9:32 AM							
5/12/2020 7:53 AM A	R FDD	GI Rodriguez	Gil Rodríguez	Sent	5/12/2020 7:53 AM							
5/12/2020 5:48 AM	R FDD	Gil Rodriguez	Gil Rodriguez	Signed	5/12/2020 5:48 AM			5/12/2020 12:15 PM				
12/30/2019 12:22 PM A	AR FOD	Chris Spears		Signed	12/30/2019 12:22 PM	12/30/2019 12:23 PM	12/30/2019 12:24 PM	12/30/2019 12:25 PM				
12/4/2019 10:13 AM A	R FDD	Gary Matthews	Gary Matthews	Signed	12/4/2019 10:13 AM	12/4/2019 12:43 PM	12/4/2019 12:44 PM	12/4/2019 12:45 PM				
12/2/2019 9:24 AM A	IR FOD	Cassidy Ford Test		Signed	12/2/2019 9:24 AM	12/2/2019 9:28 AM	12/2/2019 9:31 AM	12/2/2019 9:33 AM				
11/20/2019 12:33 PM A	IR FOO	Abby Menta		Sent	11/20/2019 12:33 PM							
11/6/2019 10:57 AM A	IR FOD	John Hancock II	John Hancock II	Signed	11/6/2019 10:57 AM	11/6/2019 10:58 AM	11/6/2019 10:59 AM	11/6/2019 11:01 AM				
8/6/2019 10:34 AM	R FDD	Gary Matthews	Gary Matthews	Signed	8/6/2019 10:34 AM	10/2/2019 1:46 PM	10/2/2019 1:47 PM	10/2/2019 1:49 PM				

🗧 📃 Franchise Sales 🕞 Da:	shboards   🗸							C	Search CRM data	Q	Cassidy Ford Anderson Roth	<mark>∼ </mark>
SAVE AS 👯 NEW 🧭 REFRESH ALL												
ersonal Sales Dashboard	~											
System Dashboards Activity Overview Checklist Dashboard	p											+
Gateway Activity Dashboard	Source Campaign	Disposition	Net Worth	Mobile Phone	Business Phone	Email	State/Provinc	Created On 🛧	Last Activity Date			
Microsoft Dynamics CRM Overview	Current Owner Referral	New	1.2 million	678-460-6749	(678) 460-6749	sara.porter@anderso		11/12/2018 7:0	11/12/2018 7:23 AM			
Operations: Location Management Operations: Project Planner	LinkedIn	In Progress	lmm	(658) 555-0146	658-555-0146	mary5@andersonrot.	Ontario	9/18/2018 1:32	8/21/2019 12:18 PM			
Operations: Site Visits	Internet Search	New		(000) 000 0000	464-555-0153							
Personal Sales Dashboard			\$251,000 to \$30						11/9/2018 12:41 PM			
Sales - Consolidated View	Franchise Magazine	In Progress	More Than \$1,0		545-555-0189	fernando60@anders.	Washington	9/12/2018 6:50 -				
Sales Performance Dashboard	Biz/Buy/Sell	In Progress	500,000+		702-555-0195	elizabeth41@anders.	. Queensland	9/11/2018 10:4_				
Salari Candidata Sasuth	Franchise.org	New	400,000 - 500,000		1 (11) 500 555-0146	colin28@andersonro	England	9/11/2018 10:4	10/29/2018 1:16 PM			
Sales: FDD's	IFA (Franchise.org)	Contacted	\$500,000 +		328-555-0176	brianna44@anderso.	Washington	9/9/2018 6:54 A				
Sales: Lead Gen Tracking Sales: Sales Coordinator												
Sales: Sales Management	Other	In Progress	200,000 - 250,000		1 (11) 500 555-0119	dana8@andersonrot.	Washington	9/7/2018 10:56 -	10/29/2018 1:17 PM			
Sales: Sales Representative												Id d Pag
Sales: Territory Requests												14 4 145
Server-Side Synchronization Monitoring												
My Dashboards									+ 🗉			
Brand Pipelines Dashboard	P											
	Type	Director Control			Ent Class Data	Stage	Status Reason			FRM Sales Funnel		
Created On ∱ Topic		Primary Contact	Mobile Phone (Prim.	Email (Primary Cont	Est. Close Date					My Open Opportunities		
4/2020 8:50 Elizabeth Keyser		Elizabeth Keyser		elizabeth0@anderso			Progress				\$125.000	
13/2020 9:24 Thomas Carter	New	Thomas Carter		frmfan2@gmail.com	7/1/2020	3 - Qualifying In	Progress				\$100,000.00	
14/2020 9:01 Transfer - #111 Kansas City, Kansas	s Resale	Leaf River Terrain			7/1/2020	9 - Validation In	Progress				\$85,000,00 \$200,000,00	
8/2020 3:57 Chris Spears	New	Chris Spears	(404) 218-8372	cspears@arke.com		3 - Qualifying In	Progress				\$110,000,00	
/17/2019 11: Gary Matthews	New	Gary Matthews	2546441503	gary@andersonroth	7/1/2020	3 - Qualifying In	Progress				\$115,000.00	
10/2019 11:5 Sara Porter	New	Sara Porter	(458) 345-0751	sara.porter@anderso	7/1/2019	3 - Qualifying In	Progress			-	\$90,000,00	
V2019 7:36 A Peter Raji	New	Peter Raji		peter26@andersonr			Progress				\$145,000.00	
										10 - Di	iscovery Day	
1/2019 10:16 Casey Teller	New	Casey Teller	6789587413	casey.teller@anders	5/31/2019	7 - FDD Sent In	Progress			11 - Pa	eckage Ordered	



The FDD dashboard gives you a high-level overview of your e-signature pipeline. Here you can quickly identify by month how effective your team has been in sending and receiving signed FDDs, which greatly impacts the time of your sales cycle and timing of won deals.

es: FDD's 👻						
	Sent E-Signature Documents 💙		10	Signed E-Signature Documents 💙		
FDD's sent and signed	Search for records	Q		Search for records	Q	
	Name 🛧	Sent On	Recipient's Em Status Reason.	Name 1	Sent On Signed On R	Recipie
Active E-Signature Documents	Abby Mehta / 11/20/2019 1:33 PM	11/20/2019 12	Sent	Brian Poff / 10/31/2018 4:46 PM	10/31/2018 3:4 10/31/2018 4:1	
	Alison Chandle / 7/16/2019 6:05 PM	7/16/2019 5:05	Sent	Brian Poff / 5/13/2020 1:18 PM	5/13/2020 12:1 5/13/2020 4:19	
20 18	Billy Gomez / 7/16/2019 6:06 PM	7/16/2019 5:06 -	Sent	Brian Test / 12/30/2019 1:22 PM	12/30/2019 12: 12/30/2019 12:	
18 -	Brian Poff / 5/13/2020 1:14 PM	5/13/2020 12:1_	Sent	Brock Hayhoe / 6/20/2019 12:43 PM	6/20/2019 11:4 6/20/2019 11:4	
16-	Brock Hayhoe / 8/6/2019 11:29 AM	8/6/2019 10:29	Sent	Brock Hayhoe / 6/5/2019 5:44 PM	6/5/2019 4:44 PM 6/5/2019 4:47 PM	
100	Clayton Raji / 7/16/2019 4:56 PM	7/16/2019 3:56	Sent	Brock Hayhoe / 8/5/2019 4:19 PM	8/5/2019 3:19 PM 8/5/2019 4:13 PM	
14-	Diana Vazquez / 7/2/2019 4:29 PM	7/2/2019 3:29 PM	Sent	Casey Teller / 3/1/2019 11:16 AM	3/1/2019 10:16 3/1/2019 10:36	
12-	Gil Rodriguez / 5/12/2020 8:53 AM	5/12/2020 7:53	Sent	Cassidy Ford Test / 12/2/2019 10:24 AM	12/2/2019 9:24 12/2/2019 9:33	
10 -	John Dean / 11/19/2018 8:54 AM	11/19/2018 7:5	Sent	Cynthia Kapoor / 7/16/2019 6:16 PM	7/16/2019 5:16 7/16/2019 5:22	
	John Hancock / 5/14/2020 12:15 PM	5/14/2020 11:1-	Sent	Dan Flowers / 3/1/2019 9:45 AM	3/1/2019 8.45 A 3/1/2019 8.54 A	
8	John Hancock / 5/14/2020 12:31 PM	5/14/2020 11:3	Sent	Diana Vazquez / 5/20/2020 3:33 PM	5/20/2020 3:33 5/20/2020 7:35	
6	John Hancock / 7/2/2019 4:17 PM	7/2/2019 3:17 PM	Sent	Gary Matthews / 12/4/2019 11:13 AM	12/4/2019 10:1 12/4/2019 12:4	
4 1 1 1	Kendra Navarro / 5/13/2020 1:24 PM	5/13/2020 12:2	Sent	Gary Matthews / 4/2/2019 10:02 AM	4/2/2019 9:02 A. 4/2/2019 9:10 A.	
2 2	Monica Arun / 5/15/2020 8:23 AM	5/15/2020 8:23 -	Sent	Gary Matthews / 8/6/2019 11:34 AM	8/6/2019 10:34 10/2/2019 1:49	
2	Noah Carter / 7/16/2019 6:00 PM	7/16/2019 5:00 -	Sent	George Chandra / 7/16/2019 6:05 PM	7/16/2019 5:05 7/16/2019 5:10	
0 Oct 2018 Mar 2019 Jun 2019 Aug 2019 Dec 2019	Pedro Arun / 7/16/2019 6:00 PM	7/16/2019 5:00 -	Sent	Gil Rodriguez / 5/12/2020 6/48 AM	5/12/2020 5:48 5/12/2020 12:1	
Nov 2018 Apr 2019 Jul 2019 Nov 2019 May 2020	Seth Cook / 7/16/2019 5:57 PM	7/16/2019 4:57	Sent	John Hancock / 3/5/2019 2:15 PM	3/5/2019 1:15 PM 3/27/2019 9:30	
Month (Sant On)	Thomas Carter / 5/13/2020 10:32 AM	5/13/2020 9.32	Sent	John Hancock II / 11/6/2019 11:57 AM	11/6/2019 10:5 11/6/2019 11:0	
	Thomas Carter / 5/13/2020 10:40 AM	5/13/2020 9:40	Sent	Mark Harrington / 7/16/2019 6:07 PM	7/16/2019 5:07 7/16/2019 5:12	
Sent Signed						