



WELCOME TO
HomeWell
Care Services®

A Franchise Opportunity Overview





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Join Us on a Path to Freedom and Fulfillment

At HomeWell Care Services our franchise owners are motivated for life changing success. They leave behind corporate America with conviction and passion to build an impactful business that empowers their employees to make a difference in the lives of others. The in-home care industry is thriving and has increasing demand. At HomeWell, we will provide you with the structure, training, and ongoing support necessary to become a successful franchise owner.

HomeWell's performance, combined with the home care industry's trajectory, have the makings of a sound and profitable investment.

\$150k

Average expected based investment amount for a HomeWell franchise¹

18.8%

Median industry revenue growth over the past five years²

30,000

Minimum number of seniors in each HomeWell territory

40%

of adults age 65 and over who need assistance with daily activities²

30%

of home care clients under age 65²

10,000

Number of baby boomers turning 65 each day through 2030³

1: 2022 Franchise Disclosure Document (FDD), Item 7
2: 2020 Home Care Pulse Benchmarking Study
3: 2020 Census



How Do We Compare?

A HomeWell Franchise is the perfect fit for those who are looking for a community service-oriented career, where financial compensation isn't the only reward for a job well done; it's the cherry on top to the satisfaction gained by caring for others and the value you add to the day-to-day lives of clients who need your help. The health care industry has proven to be extremely stable, and the desire for care in the home continues to rise. HomeWell Care Services franchise owners are well positioned to meet the needs of this growing demographic and provide peace of mind for families and individuals that need their service.

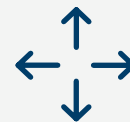
HomeWell's appeal is discernible when compared to other industries:



Reasonable investment



High revenue to investment ratio



Scalable with little additional funding



Multiple territories may be able to operate from one office



Growing market opportunity



Thriving, recession-proof industry

Who is HomeWell Care Services?

HomeWell Franchising Inc. is the franchisor for HomeWell Care Services, which provides personal care, companionship, and home maker services for seniors and other homebound individuals so they can remain safely in the comfort of wherever they call home. We are one of the fastest growing home care franchises in the industry and have built a trusted reputation for delivering peace of mind and home care that extends beyond the call of duty. Every time.

What Makes a HomeWell Franchise Different?

As a growing brand, we understand that the true measure of our success is seen by assisting our franchise owners with the establishment, launch and scaling of their agency. As a franchisor, we truly understand that our success depends on helping our franchise owners achieve and surpass their business goals. We have a sincere obligation to our owners to add value to their franchise by continuously providing the tools, resources, and support needed to build a successful home care agency in their local markets.

HomeWell Franchising helps our agency owners provide best-in-class home care services in their local markets by providing:

- Plug and play brand initiatives that position you as a thought leader in your local market
- Brand programs that will attract clients, drive referrals and differentiate you from your competition
- A robust training and onboarding process to ensure your business gets started off on the right path
- One on one business coaching with a qualified professional who has your business goals top of mind



“ Opening a HomeWell was the best decision we've made. We are confident we are on our way to a lucrative business in a shorter time frame than we thought possible. ”

Eli Collier | Nashville, Tennessee

Our Brand Promise

In addition to the business support we provide our franchise owners, HomeWell also provides owners with a home care brand that stands out among its competition. We start with our Brand Promise: **To those we serve and their loved ones, HomeWell Care Services delivers on every aspect of quality care—with trusted and reliable expertise, true compassion and a culture that prioritizes your peace of mind.** It is upon that very foundation that our Brand Pillars rest and where we provide compassionate care, reliable service, and build trustworthy relationships with our clients, families, and communities

Our Brand Pillars



Our Approach

HomeWell franchisees provide holistic homecare to every client through our overall Care Management approach. No matter the level or type of service, every client receives a Care Manager, at no additional charge, who oversees the overall care of your clients and ensures your Caregivers are in place and delivering service beyond our client's expectations. Additionally, we understand that each client has unique and individual needs that sometimes fall outside the scope of services provided at HomeWell. Our approach allows us to identify the holistic needs of each client and connect the dots of care to ancillary services offered by other healthcare professionals and traditional non-medical services. These services may include, skilled home health, hospice, durable medical equipment, handyman services, lawn care etc.. Care Managers oversee this care and act as the eyes and ears for your clients and their families.



Our Passion

HomeWell is in the business of people. Our family of owners are caring, compassionate people who operate their business with integrity and purpose. We strive on making a difference in the lives of our clients and their families by delivering on the essence of what makes HomeWell a quality leader in home care: Trusted Care. True Compassion.



Our Communities

HomeWell strives to be thought leaders in our local markets. We partner with our local communities to provide health awareness through education and outreach.

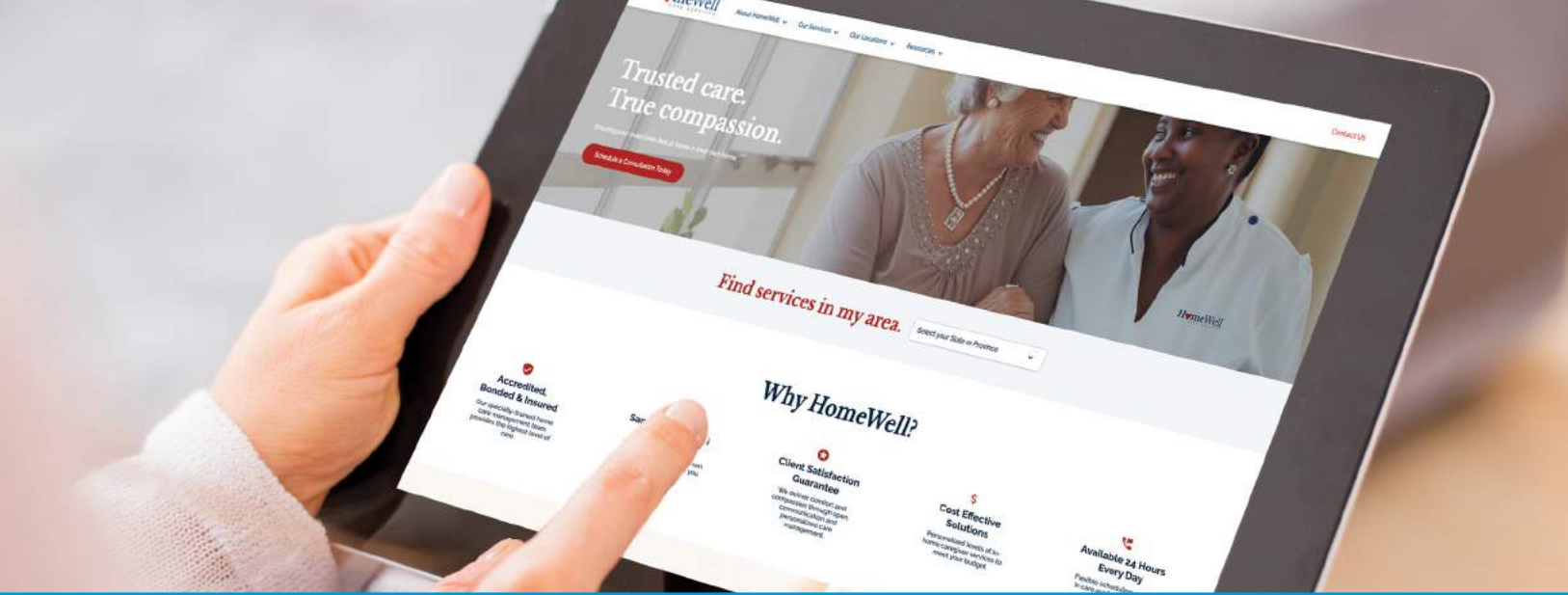
Our Brand Essence

How does one define the feeling of home? For many, it's about comfort, familiarity and the little things that make simple routines worth cherishing. It's your favorite chair or the view from the kitchen sink. Or maybe it's a fundamental feeling of place—an indelible connection with a space and the relationships housed within them, that lets you know—you're right where you belong.

We are a group of people compelled and united by a single calling: to help. To help our seniors maintain their sense of belonging and independence; to ensure all those in need receive the care they deserve; and to show overwhelmed loved ones that doing all you can for someone doesn't have to mean doing it alone. We understand that it can be scary—one can't help but feel uncertain when not feeling in control. But HomeWell Care Services exists to change that.

On its most foundational level, this starts with trained expertise and the ability to identify and properly address needs, as well as respond to new ones. See, we don't just show up prepared for the day. Our proactive approach ensures we're continuously planning for the next one, and always with your loved one's best interest in mind. Our caregivers are compassionate, our care managers are responsive, and our process is built on honest and open communication. This process is what gives us the ability to fulfill our purpose and ensures your peace of mind remains our top priority.





A Brand on the Move

HomeWell's growth has strengthened our national scale and presence. As we grow, we continue to invest in our brand for the benefit of all of our franchisees.

To ensure we deliver on what's important to the families and clients the HomeWell system serves, we engage in ongoing consumer and brand research. We also rely on our research to develop the most effective messaging and discover the best channels to promote the HomeWell brand among clients, families, referral partners, and the community.

HomeWell Marketing and Communications Support

Working with national and leading brand agencies, HomeWell develops marketing and communication programs that intend to drive leads to your business, including:



Dynamic brand and individual agency websites that effectively relay HomeWell's unique value proposition and drive leads



Effective content strategy that positions HomeWell as thought-leaders in the industry



National public relations efforts leading to increased brand awareness



Robust marketing and brand hub to personalize and efficiently obtain all local marketing collateral and resources needed to market at a local level



Making a Difference

HomeWell provides our franchise owners with comprehensive programs and support services that, when implemented, can help to reduce (re)hospitalizations, aid in decrease falls, and increase client engagement and socialization. These proprietary programs ensure confidence in our brand, help to generate leads and drive business to our franchise owners. Each program is strategically designed to enhance client care, improve quality of life and independence. These programs will not only have a positive impact on our community, but also enhance competitive differentiation, brand recognition and above all attract new referral sources.

HomeWell Cares Community Education Health Initiatives



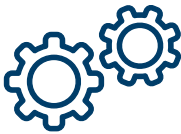
HomeWell strives to enable our franchise owners to become thought leaders in their individual markets. These programs bring value to referral sources and allow owners to cultivate reciprocal referral relationships within their community that cultivate leads and drive revenue.

Each quarter, HomeWell provides owners with fully developed tools and information about a specific health initiative giving our owners the resources needed to successfully partner with their local community to provide health awareness through education and outreach. Additionally, these quarterly health initiatives are supported with public relations support and social media campaigns. Topics have included, heart health, stroke awareness, and fall prevention.

A Foundation for Success

During the initial months prior to opening, you will receive dedicated support from members of the Opening Services and Training and Development teams as you complete important tasks needed to establish your business, gain industry knowledge, and prepare for a successful business opening.

Our pre-opening support is divided into three key phases:



PRE-TRAINING

In the weeks leading up to our core training, you will complete many foundational tasks necessary to starting a HomeWell franchise. You will also receive essential home care and industry training to prepare you for learning the “HomeWell Way.”



CORE TRAINING

This comprehensive training includes topics such as, an industry overview, HomeWell differentiators, the Franchisor and Franchisee relationship, navigating the health care maze, business ownership, talent and care management, organizational structure, and sales and marketing.



POST-TRAINING

As we continue to build on topics presented during Pre-Training and Core Training, these weeks are focused on getting your business ready for launch.



“ HomeWell, simply put, seems to do it the right way. From the focus of assessments, to the tools in place, the leadership in the Corporate Office and the existing franchise owners—this is an organization set up for success. I want to help build on that success!

”

Kevin Walters | Gateway, Florida

Committed to Your Success

After your franchise opens, know that you are never alone. We believe in empowering our franchise owners with the knowledge, tools, and training geared toward helping our owners find lasting financial success. We are committed to providing you with the support you need, when you need it. Other resources include: Sales Team Training, HomeWell Sales Professional Facebook Group, Monthly Webinars, Newsletters, and the development and roll out of strong brand programs designed to differentiate HomeWell among its competitors.

FRANCHISE SERVICES DEPARTMENT

Dedicated professionals solely focused on your business, this team is responsible for facilitating the successful launch of your business within the first 90 days of operation and beyond. They are your one-stop for all your needs throughout the life of your franchise ownership.

ONGOING SUPPORT CALLS

No matter where you're located, or what successes or challenges you're facing, our team is here for you. We provide on-going coaching and useful support tracks tailored to meet your needs.

LAUNCH PHASE

During the first 90 days of operation, each franchise owner receives weekly support and training in a group or individual setting led by their dedicated Franchise Business Coach (FBC). During this launch phase, the focus will include kick-starting sales efforts in your local community and overcoming any operational challenges or opportunities that arise.

ON-SITE SUPPORT

Our dedicated Franchise Business Coaches (FBC) provide on-site support visits to observe daily operations and sales efforts in the field. This first-hand insight on the success and challenges of your business allows your FBC to offer new strategies customized to your needs to help overall growth.

SALES TRAINING CLASS

Our series of classes provides in-depth B2B sales account education and coaching. We'll guide you through the HomeWell sales process and uncover all major B2B accounts that provide client referrals and feed our industry. Upon completion of this training, you'll receive on-going sales education and motivation from other owners and sales professionals in the HomeWell system.

LEARNING MANAGEMENT SYSTEM

Our Learning Management System (LMS) is a proprietary online learning platform which houses over 100 educational modules for you and your staff, providing accessible training anytime you need it.

Vendor Relationships

One of the most important relationships for new business owners is with his or her vendors. These businesses help provide you with everything you need to operate your business efficiently. HomeWell provides you with a head start on establishing these relationships. Our vendor relationships provide our franchise owners the benefit of buying power resulting in discounts on a variety of valuable services, as well as ensuring a standard of quality for all the products and services offered. As your franchisor, we handle these long-lasting relationships to bring these discounted opportunities directly to you, benefiting both our franchise owners and their staff.

Some of our vendor discounts include:



Background checks



Employment and Labor Law Solutions



Insurance



ClearCare Online
(Home Care Operating System)



Advertising and Marketing



Office Supplies



Payroll



“ We have a bright future as a franchisee with HomeWell. There are 10K baby boomers turning 65 for next 10-15 years and there will be a need for this industry and good franchisees who really want to serve the people to grow and prosper. We have had a good first year and already decided to purchase another territory because we see the potential. ”

Will Childers | Georgetown, Delaware



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Best-In-Class Technology

Our third-party vendor, ClearCare, is an all-in-one, Internet-based platform that allows you to grow your agency, manage caregivers, deliver care, and optimize overall operations. ClearCare analytics are highly customizable, and reporting has never been easier! You will get ahead and stay ahead using this platform.

- ✓ Web-based
- ✓ Built-in telephony with GPS locator
- ✓ Caregiver mobile app
- ✓ Integrated with QuickBooks and ADP
- ✓ Robust "Family Room" and caregiver portal
- ✓ Built-in CRM
- ✓ Automatic alerts for missed clock-ins
- ✓ Seamless staffing, scheduling and billing
- ✓ Affordable \$11.00 per client charge
- ✓ Ability to accept debit and credit cards

Investment Considerations

HomeWell understands that making the decision to go into business for yourself is not something that is entered into without careful research and consideration. It is our goal to provide you with any information needed to determine if HomeWell is the right fit for you. We offer full transparency so you can start your business with confidence.

When opening a HomeWell franchise, you can expect the following types of expenditures*:

EXPENDITURE TYPE	ESTIMATED AMOUNT
Initial Franchise Fee	\$49,500
Travel and Living Expenses for Training	\$0 - \$3,500
Real Estate	\$3,600 - \$9,000
Furniture and Furnishings	\$0 - \$5,000
Signage	\$300 - \$4,000
Computer Hardware	\$1,000 - \$3,000
Computer Software	\$876 - \$1,560
Office Equipment and Supplies	\$1,500 - \$5,000
Marketing Materials	\$2,000 - \$4,000
Local Marketing	\$3,000 - \$18,000
Grand Opening Marketing	\$1,000 - \$5,000
Payroll Expenses	\$20,000 - \$65,000
Caregiver Recruitment and Training	\$3,000 - \$6,000
Professional Fees	\$0 - \$5,000
Misc. Pre-Opening and Opening Costs	\$500 - \$1,000
Licenses and Permits	\$100 - \$6,000
Insurance	\$1,500 - \$5,000
Additional Funds (3 Months)	\$9,000 - \$30,000
TOTALS	\$96,900 - \$225,800

*See HomeWell 2022 Franchise Disclosure Document Item 7, Estimated Initial Investment for additional details on the type of expenditures, the method of payment, due dates, and to whom payment is made. These are estimates only for pre-opening and the first three months of operation, and your actual costs may vary.

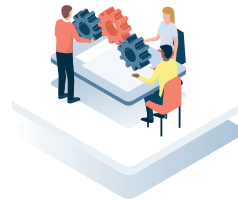
Day in the Life of a Franchise Owner

Just as you'd expect, owning a business will keep you on your toes. As a HomeWell franchise owner, your day to day will vary depending on booked hours and other variables. You can expect your daily routine to follow a plan similar to what's outlined here:



8:30 AM

Arrive at office, return emails or phone calls from previous day. Review schedule for the day, prioritize to do list



1:00 PM - 3:00 PM

Participate in some ride alongs with a sales rep at your key accounts



9:00 AM

Sales meeting – discuss revenue, goals, major accounts, sales route for the day, and strategy



3:30 PM - 4:30 PM

Sit with HR/scheduler to observe some caregiver interviews and coach for best practices



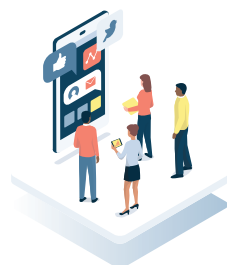
10:00 AM

Ops meeting – discuss caregiver recruitment funnel, admit hours and goals, current census, staffing and scheduling issues or concerns



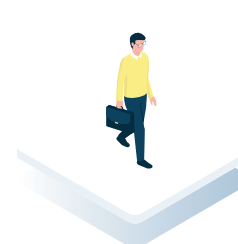
4:30 PM - 5:30 PM

Review Clear Care Data, strategize, and plan for next day



11:00 AM - 1:00 PM

Attend a networking luncheon



5:30 PM

Head home for quality time with your family

Is Owning a Franchise Right for You?



Caring Heart

The home care industry requires a caring heart and not just a focus on the bottom line.



Effective Communicator

Building relationships with your clients and caregivers is essential.



Decision Maker

Are you comfortable taking risks and making decisions?



Creative

Can you think out of the box to solve challenges?



Negotiator

Do you have the skills to navigate complex situations and still achieve a win on both sides?



Dedicated

Are you willing and able to put in the time required to achieve your goals?



Nimble

Can you easily change course and adapt to unexpected changes?



Self-Motivated

Do you have the internal drive that gives you the fuel and desire to succeed?



“ I wanted to grow along with a growing company and the processes in place at HomeWell were far superior to others I had seen. I was floored by the attention to detail. ”

Vaishali Nileswhar | Stafford, Texas



Trusted Care. True Compassion.®

Find out more about HomeWell Franchising, Inc.
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