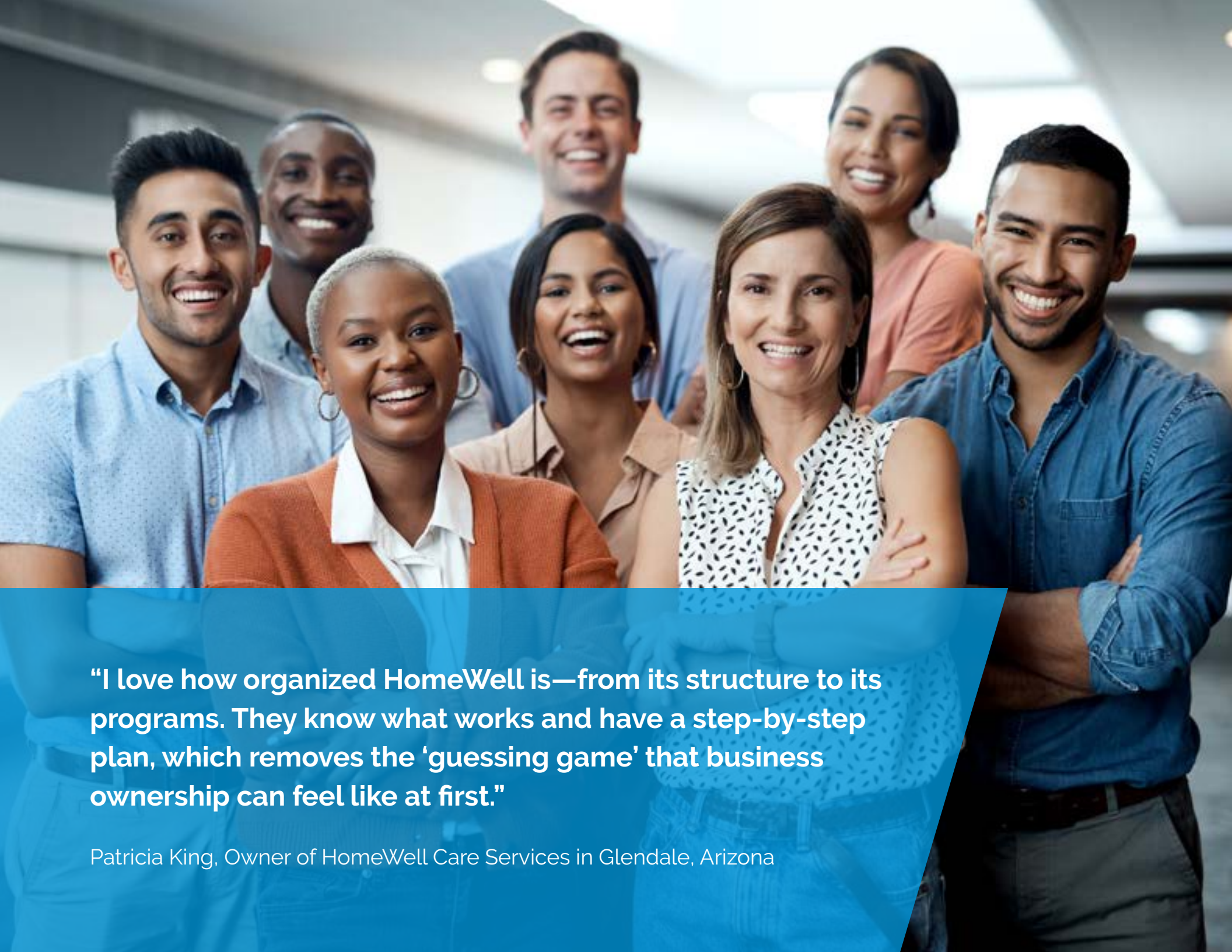




Welcome to HomeWell Care Services®

A Franchise Opportunity Overview

HomeWell[®]
CARE SERVICES

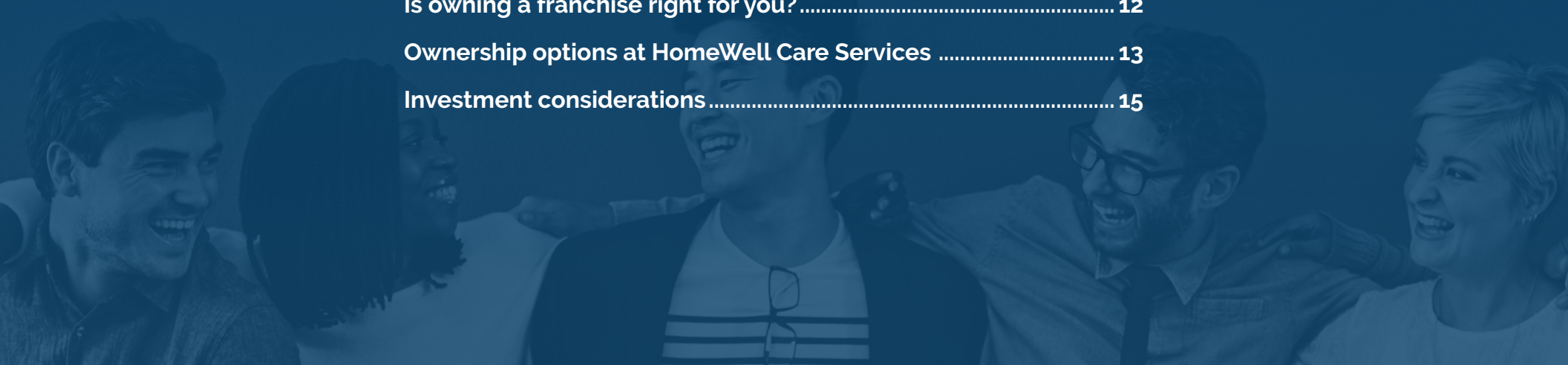


“I love how organized HomeWell is—from its structure to its programs. They know what works and have a step-by-step plan, which removes the ‘guessing game’ that business ownership can feel like at first.”

Patricia King, Owner of HomeWell Care Services in Glendale, Arizona

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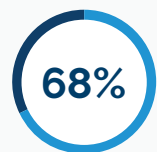


Join us on a path to freedom and fulfillment

At HomeWell Care Services, our franchise owners are driven to make a lasting impact on their communities and find true fulfillment in their work. They leave behind corporate America and other pursuits to build a meaningful legacy enriching the lives of others while also achieving their dreams of business ownership.

HomeWell will provide you with the structure, training and ongoing support necessary to help you accomplish your business goals and become a thriving franchise owner. With an established network of resources, ongoing support for franchisees and the demand for home care increasing daily, HomeWell has positioned itself as a leader in the home care sector.

HomeWell's performance, combined with our industry's trajectory, has the makings of a sound and rewarding investment.



of adults age 50+ believe they will need assistance with daily activities as they grow older¹



of adults age 50+ prefer to age from the comfort of home²

\$1.6 million

Average annual gross revenue per franchisee in 2022³



30,000
Minimum number of seniors in each HomeWell territory



10,000
Number of baby boomers turning 65 each day through 2030⁴

1: AARP | Long Term Care Readiness (2022) Long-Term Care Readiness (aarp.org) 2: AARP | 2021 HOME AND COMMUNITY PREFERENCES SURVEY: A NATIONAL SURVEY OF ADULTS AGE 18+ 2021 Home and Community Preferences Survey: A National Survey of Adults 18+ Chartbook (aarp.org) 3: 2023 HomeWell Franchise Disclosure Document 4: 2020 Census

How do we compare?

A HomeWell franchise is the perfect fit for those 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 of the satisfaction gained by caring for others and the value you add to the day-to-day lives of clients who need your help. With the healthcare industry remaining stable and a growing demographic for home care, there has never been a better time to join HomeWell in its mission to provide trusted care with true compassion.



When compared to other industries, it's clear why more entrepreneurs are more drawn to home care now than ever before:



Reasonable investment



Initial Zero Franchise
Fee available



Scalable with little
additional funding



Multiple territories may be able
to operate from one office



Growing market
opportunity



In-demand service in any
economy

Who is HomeWell Care Services?

HomeWell Care Services®, franchised by HomeWell Franchising Inc., is one of the nation's leading non-medical home care providers. HomeWell is committed to helping people live life more fully, from being a helpful companion to those who struggle with regular activities of daily living—such as grooming, cooking, errands, and medication reminders—to assisting with some of life's biggest challenges, like chronic conditions, palliative and hospice care support.

We provide personal care, companionship, and homemaker services for seniors and other homebound individuals, so they can remain safely in the comfort of wherever they call home. We also offer special programs for fall prevention, post-medical care and life enrichment.



The biggest factor for us in choosing to do a franchise instead of launching a business on our own was really the wealth of knowledge HomeWell provides. We could have gone the route of figuring everything out on our own, but we decided that the training, support, and knowledge the HomeWell team provides was worth the investment.

Elysa Coleman
HomeWell Care Services Owner in Cypress, Texas



What makes a HomeWell franchise different?

At HomeWell, we understand the true measure of our success—our owners. By going above and beyond to equip them, we have built a trusted reputation for delivering peace of mind for both entrepreneurs considering our industry and our current owners. We are deeply committed to furthering our value by continuously innovating new tools and enhancing support to help them build impactful home care agencies in their local markets.

Tap into the power of a national brand by leveraging our best-in-class resources, including:



Marketing support: Access to vendors that provide you with cost savings and revenue-driving opportunities along with our online Marketing Hub—an extensive library of approved materials to fulfill any and all of your marketing needs.



Networking opportunities: Connect with thought leaders in the home care industry and experienced franchise owners for insights into helping you increase your bottom line.



Signature Programs: HomeWell offers plug-and-play brand initiatives that position you as a thought leader in your local market and brand programs that will attract clients, drive referrals and differentiate you from your competition.



Personalized business support: One-on-one business coaching with a qualified professional who prioritizes your business goals and ongoing role-based training through our learning management system for you and each member of your team.



Seamless exit strategy: Rather than dissolving your business or scrambling to find a successor, we can find a suitable replacement to pick up your torch when you're ready to transition into the next chapter of life.

Our brand promise

In addition to our business support, we also provide 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 offers a mindful, holistic approach to home care. With a personal Care Manager and care plan and a wide range of specialized care services, we account for the individual physical, mental and emotional needs of clients to improve their long-term health and quality of life at home.



Our passion

HomeWell is in the business of people, and we wouldn't have it any other way. From the way our Care Managers interact with families and lead with integrity to the kind, nurturing touch of our caregivers, we are a people-focused franchise motivated by the difference we make in the lives of those we serve.



Our communities

HomeWell is shaping the home care industry by furthering our role within the continuum of care nationwide and in our local markets. Our agencies build rewarding partnerships within their communities to provide educational outreach and enhance the level of support for families in their areas.

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.



Focused on your growth

Our corporate team—comprised of franchising and marketing experts—provide valuable support to our local agencies and practical solutions for each franchisee to help them capture their market, build brand awareness and enhance their reputation in the community and online. You can count on us to help you establish credibility and drive business growth.

HomeWell marketing and communications support

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



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



Effective content strategy that positions HomeWell as thought leaders in home care



National public relations efforts to increase brand awareness



Marketing and brand collateral to promote the quality of your care services and for your agency to gain positive exposure within your community

Going beyond everyday care

HomeWell provides our franchise owners with comprehensive care services and specialized support offerings strategically designed to improve the quality of life and independence for each client, including programs to help reduce rehospitalizations and fall risk while safeguarding their health and increasing socialization. These proprietary programs not only positively impact those entrusted to our care but ensure confidence in our brand, distinguish our care from competitors, and, most importantly, attract new referral sources.



What our Signature Programs are:

Purposeful: Leveraging years of home care industry expertise, HomeWell identified some of the most severe obstacles threatening the health and independence of those recovering or aging at home and developed distinct care programs to help manage them effectively.

Expertly Designed: Our programs are data-driven and developed by industry experts with years of clinical and home care experience.

Proactive: We anticipate and mitigate potential health risks to help the client get ahead of them and avoid hospital readmission for circumstances that could have been prevented through proper care.

Collaborative: Our Care Managers communicate with the client and their loved one's healthcare team to ensure the best long-term outcomes.

HomeWell Cares Community Education Initiative

Our HomeWell Care Services agencies provide valuable local health care education and community outreach resources to seniors, families, referral partners and their local communities through our HomeWell Cares™ Community Education Initiative. Through this initiative, educational events and program materials are offered on a variety of health, wellness, and safety issues that often afflict our senior population. Our goal is to build awareness to help identify and avoid associated challenges and risks with these public health issues.



HomeWell cares
COMMUNITY EDUCATION INITIATIVE

A photograph of four diverse professionals in a meeting. From left to right: a man with a beard in a blue shirt and tie, a woman with short blonde hair in a tan blazer, a man with glasses in a dark blue shirt, and a woman with dark curly hair in a light blue shirt. They are all looking towards the right, engaged in conversation. The background is a bright, modern office setting with large windows.

Laying the foundation for your future

In the months leading up to your business opening, you will receive dedicated support from our Opening Services and Training and Development teams. We'll provide you with the industry knowledge you need and help you complete important tasks in preparation for launch.

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



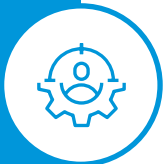
Pre-Launch

One of the first steps in our home care business training involves handling foundational tasks to support your HomeWell franchise establishment. With a better understanding of our industry and general home care practices, you will be equipped with the practical knowledge and insight to launch your business.



At Launch

As you take steps toward becoming operational, your Franchise Business Coach will visit your location before your official opening date to help with any last-minute preparations.



Post-Launch

Following the launch of your business, you can expect ongoing support as we continue building on the fundamentals of operating your agency, introducing you to more tools and resources to help you hit the ground running and reach your personal and financial goals.

Vendor relationships

As a new owner, connecting with vendors is crucial for operating your business efficiently. Fortunately, HomeWell provides you with a head start. We have existing vendor relationships that result in discounts for a wide range of valuable services and help ensure a superior experience for all the products and services they offer. As your franchisor, you can count on our due diligence to manage these beneficial relationships to continue bringing discounted opportunities for you and your agency's staff.

Some of our vendor discounts include:



Background checks



Insurance



Advertising and
Marketing



Payroll



Employment and Labor
Law Solutions



WellSky Online
(Home Care Operating System)



Office Supplies

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?



Ownership options at HomeWell Care Services

Did you know HomeWell offers two paths to business ownership? If you're considering investing in one of the nation's fastest-growing home care franchises, you now have buying options.

Upon signing your franchise agreement and paying an initial training fee of \$5,000, you can choose between the following:

Option 1: The Standard Path

Our traditional buying option includes an initial franchise fee of \$49,500, with an ongoing royalty rate of 5%.* The initial franchise fee must be paid in full within 150 days from the date of signing your franchise agreement.

Who may prefer this option: You may prefer the standard path if you would rather pay more upfront than pay a higher royalty rate. You should also choose this path if you plan to purchase more than one territory.*

Option 2: The Zero-Initial Franchise Fee

You can start your HomeWell Care Services agency with no initial franchise fee and opt for just the initial training fee of \$5,000 at signing and a 10% ongoing royalty rate until reaching a pre-determined amount of revenue.**

Who may prefer this option: This path is ideal for those seeking business ownership but who find paying a large initial fee burdensome. Through this offering, you can save the upfront costs in initial franchise fees you would have otherwise paid within the first 150 days of signing your franchise agreement and instead invest that money into launching your business. This option is only available if you plan to purchase a single territory.**

Starting a new business can feel daunting, but HomeWell is here to help. Regardless of the path you choose, we'll equip and empower you to hit the ground running and achieve your goals.

You have a dream. You have buying options. And you have HomeWell to support you throughout your entire lifecycle of business ownership. What are you waiting for?

*Under the standard HomeWell franchise fee offering, franchisees pay a nonrefundable initial franchise fee of \$49,500 plus a nonrefundable training fee of \$5,000 (which includes initial training for up to 2 attendees) due upon signing the franchise agreement and 5% royalties or a minimum royalty fee, whichever is greater. See Items 5, 6, 7, and 11 of the 2023 FDD.

**Qualified new franchisees who choose the Zero Initial Franchise Fee will pay \$0 initial franchise fee, a \$5,000 nonrefundable initial training fee (for up to 2 attendees) due upon signing the franchise agreement, and 10% royalties or a minimum royalty fee (whichever is greater) for the first \$15 million of gross revenues generated by their first HomeWell business. This incentive cannot be combined with any other incentive and is only available for new franchise agreements. See Items 5, 6, 7, and 11 of the 2023 FDD for additional terms and conditions.

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

TYPE OF EXPENDITURE ¹	LOW AMOUNT	HIGH AMOUNT
Initial Franchise Fee ²	\$0	\$49,500.00
Training Fee ³	\$5,000.00	\$5,000.00
Travel and Living Expense for On-Site Education ⁴	\$0	\$3,500.00
Real Estate ⁵	\$3,600.00	\$9,000.00
Furniture & Furnishings ⁶	\$0	\$5,000.00
Signage ⁷	\$300.00	\$4,000.00
Computer Hardware ⁸	\$1,000.00	\$3,000.00
Computer Software ⁹	\$876.00	\$1,560.00
Email Services ⁹	\$24.00	\$240.00
Office Equipment and Supplies ¹⁰	\$1,500.00	\$5,000.00
Marketing Materials ¹¹	\$2,000.00	\$4,000.00
Local Marketing ¹²	\$3,000.00	\$18,000.00
Grand Opening Marketing ¹³	\$1,000.00	\$5,000.00
Payroll Expenses ¹⁴	\$20,000.00	\$65,000.00
Caregiver Recruitment and Training ¹⁵	\$3,000.00	\$6,000.00
Professional Fees ¹⁶	\$0	\$5,000.00
Miscellaneous Pre-Opening and Opening Costs ¹⁷	\$500.00	\$1,000.00
Licenses and Permits ¹⁸	\$100.00	\$6,000.00
Insurance ¹⁹	\$1,500.00	\$5,000.00
Additional Funds (3 Months) ²⁰	\$9,000.00	\$30,000.00
TOTALS²¹	\$52,400.00	\$230,800.00

*See HomeWell 2023 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.

Investment considerations

At HomeWell, we recognize that pursuing franchise ownership requires thorough research and consideration. Throughout your due diligence process, we are committed to providing the information and resources you need to determine if we are the right fit for you. For franchising opportunities or to learn more about HomeWell, please connect with us via our contact information provided below:

Phone: 817-916-8904

Email: franchising@homewellcares.com.



I was reluctant to join a franchise, but what drew me to HomeWell was their family feel; it wasn't a corporate feel. HomeWell provides us with direction and gives us what we need but also gives us the freedom to do what we feel is best for our franchises.

Mark Fratto

HomeWell Care Services Owner in Beverly Farms, Massachusetts





Find out more about HomeWell Franchising, Inc.

homewellfranchising.com | 817-916-8904

Trusted Care. True Compassion.®

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