

From Interest to Investment: When to Start the Funding Conversation

Presented by: Benetrends Financial

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From Interest to Investment: When to Start the Funding Conversation



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IFA Presents:

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Best Practices: When to Introduce Funding

Starting the Funding Conversation

- How soon is too soon? Why earlier is better.
- Educating candidates vs. overpromising
- The franchisor's role in preparing candidates for financing
- Funding as a sales support tool, not just an afterthought



Common Pitfalls to Avoid

Mistakes We've Made (So You Don't Have To)

- Not looping in funding early enough
- Miscommunicating loan timelines or eligibility
- Assuming all brands are automatically fundable
- Overreliance on personal assumptions vs. expert guidance



Navigating Brokers & Third Parties

- Who owns the funding intro?
- Communication gaps between franchisor, broker, and funder
- Tips for staying aligned: regular check-ins, shared tracking, early introductions
- Red flags to look out for



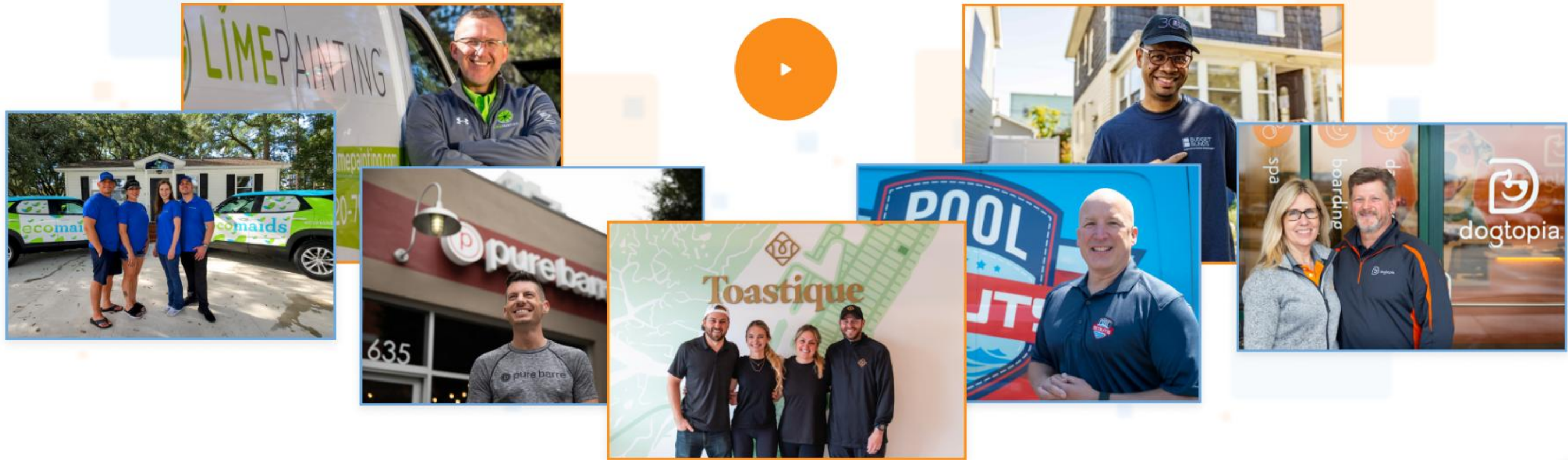
Is Your Brand Fundable? (From the Ground Floor)

Pre-Launch Brand Analysis: Funding Fit

- Drew's perspective: the role of fundability in brand selection
- What to ask funding partners before onboarding a new concept
- Historical lender trends: what Benetrends sees
- Using feedback from funders to improve franchise model positioning



Final Thoughts & Key Takeaways



Funding Isn't One Size Fits All

- Don't wait—educate early
- Use your funding partner as a true advisor
- Avoid assumptions—ask the right questions
- Alignment between brand, broker, and funder = success



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