



Welcome to Succentrix Business Advisors

The *Succentrix Business Advisors* business philosophy is not ordinary...in fact, it is extraordinary, which is why we are so committed and passionate about our company. We realize that we may not be for everyone, but for those who believe in honesty, integrity, and giving back, we believe you will be inspired by what we offer.

Our core values are integrated into all aspects of our business. We have challenged ourselves to bring our highest values into the work place, and to try to be the best demonstration of those values, absent greed on all levels.

The guiding principle in our business is to help people help people. We know that serving others' needs is our truest measure of success. This is our way of giving back, and improving economic conditions for small businesses.

As the Franchisor, we consider ourselves to be the "Center". It starts with us. It is up to *Succentrix Business Advisors* to teach, train, nurture and support each office owner.

Succentrix Business Advisors has created a fresh and comprehensive franchising model for the next generation accountant that is both cloud-based and interconnected.

Included in the model is state of the art cloud accounting and payroll software, as well as top-tier professional tax preparation software. Extensive ongoing professional training and support from a team with over 100 years of experience in franchise operations, accounting, payroll, income tax, traditional & digital marketing solutions make this model the first of its kind!

The *Succentrix Business Advisors* model enables the franchise owner to start their practice quickly and inexpensively with a foundation of solutions that are efficient, effective, profitable, and competitively priced. Each solution is designed for the franchise owner to take a leadership role in their marketplace and support their clients in finding individual real-time solutions that fit their unique needs. ®

With *Succentrix Business Advisors* at the core of your business strategy, you are free to do what you do best: assist your clients.

Success + Concentric = Succentrix, meaning that we share a common center with each of our franchise owners. This center is the heart of the matter. Skills, knowledge, expertise, integrity, dependability, compassion, and determination are necessary to run a successful venture. With these virtues at the core of our business, they become the internal values that give rise to the outward expression. It cannot be otherwise. Because of this philosophy, we are seeking people of strong character to share our vision.

MEET THE SUCCENTRIX TEAM



ALAN PADGETT – *President*

Since 1970, Alan has devoted his life to teaching accountants how to start and successfully build their accounting practices. Alan has trained hundreds of accountants to do so. He is constantly looking for new ways to streamline the accounting industry. He understood early on that business owners want and need their accountant to be proactive advisors.

In 1978, Alan, alongside his father, Walter Padgett, and brother John Padgett, co-founded the first Georgia based tax and accounting franchise model designed with the accountant in mind. In a true entrepreneurial spirit, Alan co-founded the first Georgia based Business Brokerage Franchise. In addition, Alan acquired and successfully turned around a Mississippi based tax preparation franchising company.

Alan prides himself with a hands-on management style that offers training and mentoring to each franchise owner. His desire is to help personal franchise owners to be their very best. His goal is simple: ***“If we train our accountants correctly and help them develop confidence in their abilities, they will pass their talents along to small business America.”*** Alan understands that when you help people to help people, you in turn succeed, and oftentimes surpass your own personal goals.



JOHNETTE YOUNG PADGETT – *Corporate Treasurer*

Johnette brings over 45 years of diverse business and community service experience. She has owned her own business, and helped to build and expand a multi-million dollar real estate development, construction, and property management companies as well. During the 1990's, she founded the ***Substance Abuse Prevention Fund*** sponsored by the ***Jacksonville Community Foundation*** in Jacksonville, Florida and received an outstanding ***Woman of the Year*** Award for her volunteer efforts. She was appointed by the State's Attorney's Office to serve on the ***Coalition for a Drug Free Jacksonville***, and received recognition from the Mayor's and Governor's Offices for her dedicated service. She was an active presenter at the ***Jacksonville Chamber of Commerce*** helping to strengthen and build community awareness. She served on the Board of Directors of the ***Northeast Florida Builders Association***.

In 2000, Johnette founded a non-profit healing ministry in Nashville, Tennessee for the disenfranchised and addicted of her community, specifically assisting abused and battered women who were seeking safety, respite, and redirection. Johnette's passion to help women came from her own experiences. Additionally, she served as Treasurer on the Board of Directors of a failing non-profit organization, restoring it to creditability and stability.

It is now Johnette's vision, after returning "home" to Athens, GA to be part of an economic solution that can provide hope, healing, and opportunity. ***“Our company was designed as an opportunity to offer a permanent and thriving improvement to the small business marketplace throughout America, using sound, ethical principles and values as our guide towards the greater good.”***



A. WAYNE NIX – *Vice President of Operations*

A licensed CPA in the state of Georgia, Wayne brings over 40 years of experience in accounting and taxation. Wayne has been actively involved with franchising for over 20 years, providing support and consultation in the areas of taxation, accounting, software, and general business. He has provided hands-on training for franchise owners, published monthly newsletter articles, and participated in the development of educational webcasts.

Wayne has taught income tax courses to fellow accountants at the ***UGA Center for Continuing Education, Georgia Society of CPAs,*** and ***Brenau University***. Wayne's attention to detail makes him an extraordinary leader and teacher. His character is impeccable and is reflected in all that he does. He brings enthusiasm, wisdom, talent, and a strong, professional work ethic to the team.

Wayne's passion for helping others is displayed in his current service as a board member for ***Georgia Children's Chorus***. His volunteer work at his church includes serving as Chairman of the Board of Deacons, Church Treasurer, Chairman of the By-Laws Committee, Chairman of the Finance Committee, and ad-hoc financial and tax consultant. Wayne is a member of ***AICPA*** and ***GSCPA***. He has served with the ***GSCPA*** as chapter officer in various positions. He has served several terms as Council Member, Chair, and member of the ***IT Section Leadership Team***, and has served on the ***Southeastern Accounting Show Task Force***, including terms as both Vice Chair and Chair.



NEDDA LEMMAN – *National Director of Operations*

Nedda Lemman is an Enrolled Agent with the IRS with a Bachelor's degree in Business Administration. Nedda owned and operated an Accounting and Tax Franchise in Arizona since 1997 before selling her Franchise and moving to Missouri in 2021.

Nedda has helped business owners, large and small, with their bookkeeping, accounting, taxes, tax planning, tax audits, and consulting needs.



VICKI SPENCER – *National Director of Marketing*

Vicki was a small business owner for 7 years in which she designed websites and specialized in bulk email and social media marketing. Her Associates Degree in Online Marketing has enabled her to use her creative skills to assist small business owners in either starting their dream of owning their own business, and/or increasing their growth potential. Vicki prides herself in the abilities to relate to different job industries and create a canvas that shares their skills, expertise, goals and business acumen with the world.



KEITH EARLY – *Senior Accountant*

Keith Early is a Certified Public Accountant in Georgia and Florida with previous experiences in Auditing for the Florida Department of Revenue and Tax Consulting for KPMG, Arthur Andersen and Compton & Associates.

As Keith has a Bachelor of Arts degree in Accounting as well as a Master of Accountancy from the University of West Florida, his knowledge, experience and attention to detail has made him an incredible asset to Succentrix Business Advisors.

THE VALUE OF A CORPORATE TEAM

- Security of knowing as a franchise owner, that you have competent, invested, engaging professionals who work for you.
- Safety net of information, resources and energy so that you are not alone when facing obstacles and challenges that are outside of your scope of experience.
- Access to areas of expertise that are out of your comfort zone. Removing fear allows entrepreneurs to grow with confidence.

Q and A WITH ALAN PADGETT

Q: Why did you create Succentrix?

A: *I decided there was a better way of being in the tax and accounting business.*

Q: Why now?

A: *I talked to accountant after accountant that was either laid off, down sized, squeezed out during a merger or replaced with little or no explanation or appreciation for their value. I decided that I could create a franchise that would empower accounting and tax professionals to go into business for themselves.*

Q: What is unique about your business model?

A: *Succentrix is designed with home office at the core of success. I believe/we believe that we are in business to help our franchise owners. Like a concentric circle, the franchise owner is then able to expand their reach to help their clients ...so in essence, We help people to help people. We radiate out helpfulness.*

Q: I am curious...there is a franchise in the marketplace that shares your name...are you in any way connected?

A: *My father, Walter Padgett, created his company in 1965 to provide small business services to entrepreneurs. In 1978, my brother John and I began opening franchises all over the United States. I developed the first 150 successful businesses from coast to coast and in fact consider many to be personal friends still to this day.*

Q: Where do you see Succentrix Business Advisors 5 – 10 – 25 years from now?

A: *Just like I have seen accountants leaving corporate America with a need to open a franchise for themselves, I have seen entrepreneurs deciding to follow their passions. As they open businesses to do web design, photography or to market their talents, they will have a need to hire accountants, tax professionals and business advisors to provide services to them. Succentrix is designed to help.*

Q: What are you the most proud of in year 3 of Succentrix Business Advisors

A: *We are the fastest growing accounting franchise in America. We are averaging one new office a month at this time... Yours could be next!*

**FEEL FREE TO REACH OUT TO
ANY OF OUR OWNERS**

www.succentrix.com

WHY INVEST IN A FRANCHISE?

There are many reasons to invest in a franchise to secure your future as opposed to going it alone. The following are some of the top benefits:

Higher Likelihood of Success: Because the details have already been worked out, it is more likely that a franchise business will succeed over an independent start-up.

Franchisor Training & Assistance: Even if you are the most accomplished accountant on the planet, you may not be well versed in the other areas of business operations, such as human resources, purchasing, scheduling, planning, marketing, sales, customer service, insurance, administration and all the other areas and myriad details that are involved in running a business. A Franchisor can provide you with valuable training and assistance in these areas.

Easier to Obtain Financing: Because a franchise is more likely to succeed, banks and other lending institutions are more likely to provide funding.

Support From a Knowledgeable Source that Benefit from Your Success: Franchisors bring a wealth of knowledge to the table in terms of starting and operating a new business. They also have a vested interest in the success of their Franchise Owners. The more funds your franchise generates, the higher the service fee payment the Franchisor receives. A reputable Franchisor will be committed to helping you build a profitable business.

Marketing and Sales Know-How: Many business owners have no training in marketing and sales, areas which are vital to small business success. A Franchisor well versed in these fields is a major asset when growing a business. A marketing platform is designed for you with Succentrix.

Lower Likelihood of Mistakes: A Franchisor has probably already made the mistakes and learned how to avoid the pitfalls. This experience can very well make the difference between succeeding and failing.

Economies of Scale: An independent business owner has the buying power of one. A Franchisor usually has negotiated special rates with suppliers from which you can benefit.

A Proven Operating System: A quality franchise opportunity will provide you with a fully developed and proven operating system. We have done all of the research and have designed a system that works.

A Faster Opening: Because the Franchisor gives you a step-by-step roadmap to launching your practice as well as informed advice along the way, you can open your business and start generating revenues more quickly.

Equipment and Supply Packages: Knowing what equipment, computer hardware and software, furniture, supplies and other materials to purchase to most effectively operate the business is a tremendous benefit.

Peer Support: A franchise typically offers support from both the Franchisor and from your fellow Franchise Owners. Who better to look to for assistance than someone who has experienced the exact same circumstances as you?

A Compatible Business Culture: Investing in a franchise with a company that matches your values, philosophy and goals can be a tremendous emotional and motivational benefit.

**Be a part of a nationally branded franchise and insure you are
"Known" and can be found in internet searches.
Your franchise business is marketable and sellable.**

WHY SUCCENTRIX BUSINESS ADVISORS

- Do I have the marketing and sales skills to quickly add clients?
- What accounting, payroll, and tax services should I offer or not offer to my clients?
- What would happen to my accounting business if I became incapacitated?
- Where would I go for tax advice if I cannot answer a client's question?
- Do I have enough income tax training and experience to prepare tax returns?
- What type and size businesses should I target or avoid as clients?
- What do I know about selecting the right computer and office equipment, and reliable accounting and tax preparation software?
- Who would I call for advice if a client were audited?
- What advice would I give regarding the right legal corporate entity status?
- How will I know if I am over or under charging my clients?
- Do I need a website, and what will it cost in time and money to set up and maintain?
- Will I have time to stay on top of accounting, tax and payroll changes so I do not risk losing my clients?

Succentrix Business Advisors has the answers!

Testimonials from Succentrix Business Advisors

"The two biggest things that initially attracted me to Succentrix was the support I could receive in tax preparation and marketing. These were areas that I knew I would need help. And, the help I have received in these two areas has been an important part of my success so far. However, what I didn't realize I would get with Succentrix was a new family. The relationships I have with those at the corporate office and with the other franchise owners are where I have received the most value from being part of Succentrix."

– Wade Hirschi, Afton, WY

"Buying a Succentrix Franchise became an easy decision for me after I met the Athens group and realized I would not be alone running my new business. I had knowledgeable professionals at my fingertips to answer questions, bounce ideas off of and support where I needed it. I am proud to be a part of this growing Succentrix Family and the resources they provide so that I can be successful."

– Roni Hayes, Live Oak, FL

THE SUCCENTRIX ADVANTAGE

- License to use the SUCCENTRIX BUSINESS ADVISORS brand
- Protected territory with expansion potential
- Cloud accounting and payroll software
- #1 ranked income tax software powered by Drake
- Personalized Succentrix website landing page for each franchise owner
- Pre-opening office support
- 1 Week of operational, accounting, payroll, income tax, software, marketing and building your business training
- Exclusive operations manual
- New client acquisition program
- Income tax reference and CPE credit guides
- Income tax preparation training and materials
- Income tax preparation reviews and support
- Proactive strategic advice including new business lists for your market
- Print marketing materials
- Innovative marketing to help attract and retain clients
- New client setup and review and support
- Dedicated support team with over 100+ years' experience

**For all this and more, start your
Succentrix Business Advisors franchise for just \$29,900.00!**

INITIAL INVESTMENT

There is a Better Way of Being in the Accounting and Tax Business



TAKE ANOTHER JOB

- Work employer schedule
 - Use employer software systems
 - Conform to employer rules
 - Fear being replaced
 - Ceiling out your personal growth
 - Someone owns you = Salary
- ? cost of living increase

HANG YOUR OWN SHINGLE

- Work 24/7
- Research and buy software
- Fully responsible for all problems
- Fear of not making ends meet
- Learning curve? Now what?
- You are alone = Cost of doing business and paying for tools and support while supporting you and your family

OWN YOUR OWN SUCCENTRIX FRANCHISE

- Enjoy a developed system of success
- Utilize the latest industry technology
- Call on a team ready to support you
- Safety net of resources to trust and rely on
- Training, Marketing and Branding Drivers
- The sky is the limit \$29,900 = Proven System, Latest Technology, Support Team, Freedom without fear & unlimited growth potential

VISIT SUCCENTRIX BUSINESS ADVISORS

You may know Athens as home to the University of Georgia and the Georgia Bulldogs or as the music mecca of the south, but Athens is also home to the State Botanical Gardens of Georgia, the “Tree that Owns Itself” and the double-barreled cannon, an American Civil War era experimental weapon.

Athens, Georgia was born in the 18th century and boasts to this day both Antebellum architecture and remnants of the civil war. Nestled along the banks of the Oconee River, which flanks our beautiful city, we are just an hour drive from Atlanta. Our weather is mild as we are shielded by the Blue Ridge Mountains from harsh winters and warmed by coastal winds coming off the ocean just a few hours to the East.

While you are here, enjoy a show at the Classic Center, music at the Melting Point or wander the galleries of the Georgia Museum of Art. We have five start restaurants and “home town cooking” hole in the walls. Buy a trinket from a street vendor or take in a one of a kind masterpiece from a local artist. Wander the farmers market or the shops of “Normaltown”...your visit with us will be business beneficial and personally enjoyable as well!

Athens is known to be a small business incubator and has given birth to some of the most successful franchise home bases known to corporate America! Welcome to Athens and to Succentrix Business Advisors. Knowing where your franchise was born and where you are supported from is as important to your peace of mind as where you currently reside.

When you come to visit us at our corporate office, your invitation day will include:

- A comprehensive overview of our fresh innovative franchise model.
- A test run of our state of the art cloud based accounting and payroll software as well as top tier tax preparation software.
- An in depth exploration or your market potential and development strategy.
- Hotel accomodations are “our treat”.

Together we will map your training schedule and outline the opening of you new business. Call 706-621-0787 or email alan@succentrix.com to book your Invitation Day. We look forward to seeing you soon!



Come for a visit at 1 Huntington Road, Suite 702, Athens, GA 30606
www.succentrix.com

PRELIMINARY APPLICATION

PERSONAL INFORMATION

Date: _____
Name: _____ D.O.B.: _____
Residence Address: _____
City: _____ State: _____ Zip: _____
Home Phone: _____ Cell Phone: _____
Email address: _____ Birthday: _____
Marital Status: _____ Spouse's Name: _____ Children _____
I am a U.S. Citizen: Yes No If no, immigration status is currently: _____

EDUCATION

Institution: _____ Did You Graduate? Yes No
Date Graduated: _____ Degree: _____
Other: _____

BUSINESS EXPERIENCE

Current Employer: _____
Business Address: _____
City: _____ State: _____ Zip: _____
Phone : _____ Type of Business: _____
Length of Employment: _____ Position: _____
Previous Employer: _____
Business Address: _____
City: _____ State: _____ Zip: _____
Phone : _____ Type of Business: _____
Length of Employment: _____ Position: _____
Spouse's Employer: _____
Business Address: _____
City: _____ State: _____ Zip: _____
Phone : _____ Type of Business: _____
Length of Employment: _____ Position: _____
Memberships and Affiliations: _____

FINANCIAL INFORMATION

Current Income: \$ _____ Spouse's Current Income: \$ _____

Net Worth: \$ _____ Cash Available for Investment: \$ _____

Do you presently: Own or Rent a House, Condo, or Apartment? Approx. Equity in Home: \$ _____

Do you have a source of financing for this investment? Yes No Source(s): _____

Additional Pertinent Information: (attach separate sheet, if necessary): _____

I understand that a more complete financial statement will be required prior to the purchase of a Succentrix Business Advisors franchise.

GENERAL INFORMATION

By what date do you wish to open your franchise? _____

What City/Area(s)? _____

Are you willing to relocate? Yes No If yes, to what area(s)? _____

General remarks and/or questions: (attach separate sheet, if necessary) _____

How did you hear about Succentrix? _____

*I understand that the receipt of this data or any other information obligates neither me nor Succentrix Business Advisors, Inc.
and that this information is confidential.*

By: _____ Date: _____

(Signature of Applicant)