

Enjoy
the
Independence
of
Owning
a
Profitable Business

Introducing . . . The Brightscape Franchise
The only Franchise Offering Investment Advisory Services
No Previous Investment Experience Required!

Proven Profitability

If you have ever thought about owning a business, consider this fact: startup investment advisory firms' gross profit margins averaged 47.7% during 2000-2002 (bizminer.com survey). Even more impressive — this is at least double the profit margin for startups in other industries.

What if you started your own business — a Brightscape franchise, the ONLY franchise providing a turnkey method to become an independent investment advisor. With initial training, award-winning software tools, ongoing training, marketing and back office support built into the franchise agreement ■



Reasons To Become A Brightscape

Franchisee



- ✔ Brightscape franchisees know the demand for investment advisory services far exceeds the supply of service providers. Today, approximately 23 million Americans with investment portfolios receive no professional advice. The market for your expert investment guidance is limitless.
- ✔ Brightscape franchisees understand the financial needs of the millions of “baby boomers” retiring in the next two decades. You will show your baby boomer clients how to invest retirement funds for maximum return and minimal risk.
- ✔ Brightscape franchisees recognize the growth of 401(k) plans has created an urgency for effective portfolio management. You will answer the typical investor question “How do I allocate my 401(k) assets now to achieve my objectives?”
- ✔ Brightscape franchisees benefit from the knowledge and expertise of Brightscape founders Weiss and Peters. They are experts in the economics of business. They understand the necessary ingredients to make you successful.
- ✔ Brightscape franchisees and their clients enjoy an affiliation with the well-known investment firm, Fidelity. Weiss and Peters originated an innovative arrangement with this firm. As a franchisee, you can open Brightscape accounts, yet still operate as an independent franchise business.
- ✔ Brightscape franchisees can operate their businesses from their homes.
- ✔ Brightscape franchisees’ initial business investment is no more than \$5,000.

What You Gain By Owning A Brightscape

Franchise

Purchasing a Brightscape franchise entitles you to multiple benefits. Here’s a summary of franchise ownership benefits.

- ✔ The Brightscape System gives you a competitive edge. You outsource labor-intensive tasks so you can operate at low fixed costs. You focus your energy penetrating markets others cannot profitably pursue.
- ✔ Franchisees enjoy Brightscape’s association with a recognized “brand” in the investment industry, Fidelity Institutional Brokerage Group. Franchisees can offer thousands of mutual funds and stocks, get security and economic research, and receive preferential pricing on security trades.
- ✔ We provide a One-of-a-Kind Training Program based on a template used by the most successful investment advisors. Your path to success begins with expert instruction that requires no investment experience.
- ✔ After passing the Series 65 exam, a licensing requirement to provide investment advice, we list you on our investment advisor registration statement. This fast track licensing procedure guarantees that you
 - 1) Do not need to establish your own company,
 - 2) Pay no corporation incorporation fees nor annual taxes, and
 - 3) Do not need to complete a separate regulatory registration statement.
- ✔ Brightscape offers automated tools to reduce costs. The award-winning software, Advice Manager, leads you through the investment process. It provides an automated trading platform connected directly to Fidelity’s order input system.
- ✔ New business owners spend a high percentage of their time marketing their services. The Brightscape System expedites your startup marketing. We assist you in preparing and executing direct mail campaigns, investment seminars, institutional marketing, and we provide qualified leads within your protected territory.





Our Award-Winning Software Advice Manager: An Integral Part Of The Brightscape *System*

Brightscape System design makes it easy to operate a successful investment advisory service when you open your franchise. The System draws on Nobel-prize winning work in Economics and Finance.

Incorporating the recommendations of successful investment practitioners, Advice Manager is an integral part of The Brightscape System. It leads you through each step of the investment process and automates many of the tasks.

Advice Manager was cited as one of the "Best Technologies of 2002" for investment advisors. This citation was made by MorningstarAdvisor.com, a well-known financial advisory web site.

How To Become A Brightscape *Franchisee*

Brightscape franchise ownership offers an exceptional opportunity to succeed as an investment advisor. You can review these steps to learn how to become a franchisee. We estimate a period of 90 days from the initial qualification to open your Brightscape franchise.

Step **1** *Complete the Initial Qualification Summary*

- A. Contact us directly. Use the information provided in the section The Next Step.
- B. Complete the Initial Qualification Summary we will you.
- C. Mail or fax the Initial Qualification Summary to us.

Step **2** *Decide To Become A Brightscape Franchisee*

We will review your Initial Qualification Summary. If we believe you have the potential to be a successful franchisee, we will invite you to spend a day at Brightscape's Miami, FL headquarters.

Within a few days of your visit, we will inform you if you have been awarded a Brightscape franchise. We will ask you to make your decision in a timely manner.

Step **3** *Train For The Series 65 Exam*

Through a series of web-based conferences, we will train you to pass the Series 65 investment advisor exam. This training lasts about 2 weeks. As soon as you complete the training, you should arrange to take the exam.

Step **4** *Train To Be An Investment Advisor*

After passing the Series 65 exam, you can begin investment advisory training.

During your on-site training in Miami, you will learn about the investment advisory business. The training modules are as follows:

[The Investment Process](#) • [Stock Basics](#) • [Sales Techniques](#) • [Bond Basics](#)
[Software Usage \(including how to use Advice Manager\)](#) • [Client Presentations](#)
[Client Communications](#) • [Mutual Fund Basics](#) • [Account Maintenance](#)

Step **5** *Open Your Investment Advisory Business*

When you complete your training, you are ready to open your business from your home or out of home office. We will help you with lease negotiations and signage requirements if you open an office away from your home.



Presenting The Brightscape
System Creators:

Weiss + Peters

Eric Weiss and Dirk Peters co-founded Brightscape Investment Centers, Inc. in 1999. Their bios are presented here.

ERIC
PHOTO

Eric J. Weiss

- Advised international institutional pension plans, central banks, wealthy families and 401(k) sponsors on asset allocation.
- Directed the business development activities of J. P. Morgan's Global Asset Management and Private Bank Division in Latin America.
- Senior executive responsible for Citicorp's mergers and acquisitions, public debt and leveraged capital financings in the Caribbean and Central American region.
- Interned at the Center for Research in Security Prices (Chicago, IL) under the direction of Professor Myron Scholes, a recent Nobel Prize recipient for his work in option pricing.
- Wrote masters economics thesis at Columbia under direction of Robert Mundell, a recent Nobel Prize recipient for his work in international monetary economics.
- Earned MBA in finance from the University of Chicago and MA in Economics from Columbia University.
- Holds a Series 65 investment advisor license.

R. Dirk Peters

- Co-founded and managed Paradigm Capital Advisors, Paradigm International Securities, and Paradigm World Index Funds (collectively, "Paradigm").
- Vice President for Citicorp's Cross Border Finance Group, the area responsible for all Latin American investment banking activities.
- Responsible for structuring senior and subordinated debt for middle-market leveraged buyouts in Citibank's Leveraged Finance Group.
- Earned MBA in Finance and International Business from Columbia University.
- Holds Series 7, Series 24, and Series 63 security licenses.

DIRK
PHOTO



Summary of Estimated Investment

The initial investment in a Brightscape Investment Center Franchise is \$5,000.

The total investment in a Brightscape franchise ranges from \$15,000 to \$62,000. We require franchisees to have a net worth of \$25,000 to \$75,000 with at least \$20,000 in liquid assets.

We can help you get financing from the Small Business Administration (SBA). Refer to www.sba.gov for financing criteria. Minority franchisees or those serving minority communities may be eligible for special SBA programs.

To help you understand franchise investment costs, we prepared a "Summary of Estimated Investment." This document is available on our web site www.gallop4media.com/root.

Take The "Next Step"

Your next step is to take advantage of this outstanding opportunity to own a Brightscape franchise. Contact the Brightscape management team today.



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E-mail: info@optimizeusa.com

You can also access our web site (<http://www.gallop4media.com/root>) and complete a "Request for Information" form. We will then contact you as soon as possible.