



# Take Flight Franchise Report





*Jim Carpenter - Founder, CEO and President of Wild Birds Unlimited*

Disclaimer - This is not an offer to sell or a solicitation of an offer to buy a franchise. Any offer to sell a franchise will be made after individuals have completed an application and been qualified to receive a Franchise Disclosure Document. For those individuals who qualify, an offer to sell the franchise will only be made in conjunction with the delivery of a Wild Birds Unlimited Franchise Disclosure Document.

You may request a confidential application from Wild Birds Unlimited, Inc. by phone, mail or access it from [wbufranchise.com](http://wbufranchise.com). Other qualifications will apply in determining whether you will be offered a Wild Birds Unlimited franchise. If you currently reside in the state of Hawaii, please call Paul Pickett at 1-888-730-7108 before completing the application. Minnesota File No. F-2491

You should not take the franchisee's statement or their experience as an inference that the purchase of a franchise is a safe investment or that failure, loss or default is impossible or unlikely, or that earning or profits are assured.





# Take Flight Franchise Report



“My decision to open a Wild Birds Unlimited store started in the spring of 1996, and it was the best career

decision I have made. I decided to become a franchisee after comparing several businesses. Eventually, I decided that Wild Birds Unlimited had the best marketing program, support staff and ultimately was the best fit for me. The franchise has given me the tools and knowledge to succeed in business. I have also developed wonderful friendships, both working and personal, within the franchise.”

**Ellen Davis - Franklin, MA**

Wild Birds Unlimited is the first and the largest franchise system of backyard bird feeding and nature appreciation retail stores in North America, with more than 340 locations in the US and Canada. Offering over 600 private label and/or proprietary products, we are dedicated to helping our customers attract and enjoy birds and nature in their own backyards.

Our owners are passionate people; they are passionate about owning and building their own business and controlling their own destiny. They are enthusiastic about the hobby of bird feeding and the enjoyment of nature, and they love sharing this enthusiasm with their customers. They love the impact that they have in their communities for good. Wild Birds Unlimited franchise store owners are the backyard bird feeding specialists within their local community and a premiere source for the highest quality bird food, bird feeding products, and local nature information.

If you have similar passions and want to be involved with the industry leader, we hope you will keep reading to learn more about the Wild Birds Unlimited franchise opportunity!



“The support I received from the Wild Birds Unlimited Franchise Support Team has been nothing but first class. From the initial submission of my application, review of the FDD, signing of the Franchise Agreement, the Meet the Flock meetings, New Store Training and all the way up to my store opening. The professionalism and passion exhibited by all exceeded my expectations. I couldn't be more happy to be a part of such an outstanding family!”

**Jim Walker - Denville, NJ**

# What's in it for YOU?



## **Investment in yourself**

Owning your own business is a step toward personal fulfillment. If you are like many of our owners,

you are tired of working for someone else and the idea of running your own business has a wonderful appeal to it. As a Wild Birds Unlimited franchise store owner, you are making an investment in yourself, but you will never be alone. Our Franchise Support Center staff, as well as our Owner Community, will support and help you achieve your goals.

## **You bring joy to your customers by helping them with a favorite hobby**

At the end of each day, you will know that you and your business have enhanced the lives of countless customers. Backyard bird feeding is a joyful experience – you are in charge of adding to that joy and sharing in it. Not a bad way to spend your day, right?

## **You serve your community through nature education and events**

Wild Birds Unlimited has established wonderful partnerships in the nature community with organizations such as the National Audubon Society, The Cornell Lab of Ornithology,

and the North American Bluebird Society, to name a few. We encourage you to develop your own local strategic partnerships with organizations, clubs and institutions. Participating in nature events is fun and will bring you and your staff together with others. This will help raise awareness and drive business to your store while serving your community.

## **You serve nature through caring for backyard birds and wildlife**

As a Wild Birds Unlimited franchise store owner, you know that you are in the business of serving nature and the environment. If this is a comforting thought to you, then you are on the right track in learning more about joining our team. We strive to care for backyard birds, wildlife and nature by providing safe and healthy food, feeders and decorative products. In essence, you are a caring, helpful partner in our natural ecosystem.

## **You have the opportunity to create an asset**

Most of us want to own a business so that we will have something of value when we are ready to retire. With Wild Birds Unlimited best practices, you have a proven system of operations, training, and support to help you achieve that goal. Ask our franchise store owners and you will understand how our best practices have helped them build their businesses.



*Wild Birds Unlimited store in Bend, Oregon*

## Wild Birds Unlimited Franchise Store Owner Profile

If you put all of our franchise store owners in a room together, you would meet a wide variety of personalities with vastly different backgrounds and business experience. So, how do you know if this business is a good fit for you?

We encourage you to begin exploring with us. We have spent more than 35 years building the Wild Birds Unlimited brand and the processes that support our franchise store owners. We will take things step-by-step together, and our experience tells us that soon we will know whether Wild Birds Unlimited franchise ownership is a good mutual fit. During the early steps of our discovery together, we will encourage you to speak with existing franchise store owners. Each owner will give you a unique view into what it's like to be part of the Wild Birds Unlimited franchise system.

### **Do I need to have bird expertise?**

The easy answer is no. Should you enjoy birds and nature? Yes! Our comprehensive training program will give you all you need to build your product and customer service knowledge. Resources for gaining expertise are available online, over the phone via our Franchise Support Center, and in person through our on-site training and meetings with your coaching team.

### **What is essential to my success?**

Passion, Passion, Passion! Passion for your business is what will help you be successful. In your store, your staff will feed off of this passion and so will your customers. If you are passionate about helping people live a more enjoyable life through interacting with nature and are passionate about building a successful business for yourself and achieving your financial goals, you will be on the right track to meet your goals as a Wild Birds Unlimited franchise store owner.

# What We Do

## Our Mission:

We Bring People and Nature Together...and We Do It with Excellence.

## Our Values:

- We Believe in Being Honest, Ethical and Respectful with Everyone.
- We Embrace Diversity in our Community.
- We Guarantee our Products are of the Highest Quality, are Truly Effective and are an Excellent Value.
- We Support Sustainably-produced Products whenever Possible.
- We Support Local and National Bird and Wildlife Habitat Conservation Organizations and Educational Programs.

## Our Vision:

We Bring Joy into our Customers' Lives...by Sharing our Passion for Birds and Knowledge about the Hobby of Backyard Bird Feeding.



Each Wild Birds Unlimited store functions as a true community resource, providing valuable knowledge about the bird feeding hobby and a unique shopping experience. The Wild Birds Unlimited Hobby and Nature Education training system will teach you how to help your customers turn their yards into a bird feeding habitat that not only brings song, color and life to their homes, but also benefits wild birds and the environment.



# The Industry

With more than 340 locations across 40+ US states and 5 Canadian provinces, Wild Birds Unlimited offers an exciting franchise opportunity. The demand for backyard bird feeding supplies is continuously on the rise. In a 2016 survey, the U.S. Fish and Wildlife Service reported:

- **81 million people participate in bird feeding and watching wildlife in their own backyards**
- **\$5 billion dollars are spent annually on bird seed**
- **\$960 million dollars are spent on bird feeders, bird baths and nesting boxes**
- **\$7.6 billion dollars are spent annually on bird feeding and watching wildlife**



“I’m as excited today about coming to work and being a part of the Wild Birds Unlimited franchise system as I was in 1990 when I first started this business. But I’m even more excited about the future.

Wild Birds Unlimited has a long history of being at the forefront of the bird feeding and watching industry - the franchise really has a clear vision of where we need to go and how we can best get there.”

**Susan Maranhao – Sudbury, MA • WBU Franchisee Honor Award Recipient 2017**

# A Team Approach



*From left:*

*Paul Pickett: Chief Development Office*

*Amy Moore: Vice President of Retail Concepts*

*Pat Perkinson: Chief Operating Officer*

*Jim Carpenter: Founder, President and CEO*

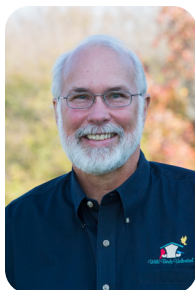
At our Franchise Support Center in Carmel, Indiana, you will find the Wild Birds Unlimited Franchise Support Center, where a team of more than 40 professionals is dedicated to offering franchise store owners one of the best quality experiences as a business owner.

Our comprehensive support includes:

- **Executive, tenured team leadership including our founder and CEO, Jim Carpenter**
- **A detailed system of best practices from 35+ years of Wild Birds Unlimited franchise experience**
- **Dedicated team members to outline and assist in every step of the process of new franchise ownership from discovery to business planning and financing, site selection and lease negotiations, store build-out and grand opening**
- **Comprehensive training and on-going support that is focused on accessibility, communication, and education to assist our franchise store owners in profitability and overall success as a business owner**
- **A business model that helps you, as the business owner, to achieve your goals while providing services and products to your community that foster a love and respect of wildlife and nature**



# History



**Jim Carpenter**  
Founder, President & CEO

Jim Carpenter grew up in southern Indiana and discovered his fondness for wildlife and nature during visits with his grandmother, who introduced him to hummingbirds, shrikes, mockingbirds and other interesting birds and wild things. After earning his BS in Biology from Indiana University in 1975 and a MS Degree in Horticulture/Plant Physiology from Purdue University in 1978, Jim decided to open his own store in 1981 and called it Wild Birds Unlimited. This unique shop, one of the few of its kind open in North America at the time, specialized in all of the supplies that help people attract, feed and enjoy birds in their own backyard.

Through the inquiries of friends and customers, Jim began franchising his concept in 1983 throughout the Midwest. Over the next 10 years,

Jim welcomed more than 100 Wild Birds Unlimited store owners into his



“We knew from day one that we wanted to run multiple Wild Birds Unlimited stores. We told WBU from the get-go that becoming multi-unit owners was our long-term goal, and they’ve been helping us make that dream a reality since we first signed our franchise agreement.”

**Trisha & Brandon Lohman – Chesapeake & Virginia Beach, VA**

system. Less than four years later, the number of stores doubled to 200. Jim dedicated himself and his staff to building a rock-solid support system of best practices – providing tools for success through unparalleled education and communication with his store owners throughout the system.

Jim Carpenter’s dedication to his franchise store owners has paid off. Today, Wild Birds Unlimited is the proud recipient of the following Franchise Business Review awards for Franchisee Satisfaction:

- **#2 in Retail Franchise Category**
- **#8 Overall Top 50 Best of the Best Franchises**
- **#8 in Large Class Franchise (systems with more than 250 units)**



2020 FRANCHISEE SATISFACTION AWARD WINNER  
**Top 10 Overall**  
for More Than 6 Years

Ranked #1 or #2 in Retail Sector for 14 Consecutive Years  
FranchiseBusinessREVIEW  
FranchiseBusinessReview.com

## Products & Services



Wild Birds Unlimited stores provide the following products and services to their community:

- **The highest quality bird food and bird feeding products available**
- **More than 600 private label and/or proprietary products**
- **Unique home and garden products and gift items**
- **Community partnerships in bird and wildlife education**
- **Consultation services for creating backyard habitats for birds and wildlife**
- **Online Shopping**



“One thing that’s different about Wild Birds Unlimited is that we have so many proprietary products - things that people can’t find anywhere else because they’re exclusively made for us. If I would have gone off on my own, I would never have been able to afford the types of private label products that I am able to offer my customers now.

When customers come into a Wild Birds Unlimited store, their expectations are high because the stores across the country have set the bar for outstanding customer service and outstanding products and selection. We’re able to provide something a little bit more than the average store.”

**Sheryl Caine – North Olmsted, Strongsville & Bay Village, OH**

# Why Wild Birds Unlimited?



Wild Birds Unlimited was founded with the mission:

***“We Bring People and Nature together...  
with Excellence<sup>®</sup>”***

Today, Wild Birds Unlimited is the largest franchise system dedicated to the needs of the backyard bird feeding and nature-loving community.

As a franchisor, Jim Carpenter has spent the latter half of his 35+ year business career perfecting his franchise model to give his franchise store owners the best possible business ownership experience. The Indiana-based Franchise Support Center is the hub for communicating best practices to the franchise

community and developing new and innovative products that help Wild Birds Unlimited stores continue to lead the way in their industry.

## Franchise Support Center – Here For YOU

Wild Birds Unlimited has a team of more than 40 professionals at our Franchise Support Center in Carmel, Indiana where we are dedicated to helping you be as successful as possible. We encourage every franchise store owner to utilize our 35+ years of expertise in running their business. From the very first day of exploring the Wild Birds Unlimited franchise opportunity to your Grand Opening and beyond, we are here to give you comprehensive, step-by-step support in the critical areas of:

- **Franchise Development**
- **Purchasing**
- **Marketing**
- **Inventory Management**
- **Visual Merchandising**
- **Retail Operations**
- **Communication and Training**
- **Information Systems**

“No matter what question I take to my coach, they will find the answer for me. If they need to direct me to another person at the franchise who specializes in that area, then that person becomes involved also. They are all so knowledgeable and they are all very patient. They bring so much value – I would never be able to go out and gather this kind of information on my own.” **Abbie Pressley – Greenville, SC**



# The Business Case

## Winning Culture

In 2020, Franchise Business Review ranked us in the Top 10 overall for franchisee satisfaction of all of the brands they surveyed. When our franchise store owners are happy, we know we are doing something right. And, we are committed to learning more from our owners and franchise community so we can continue to identify best practices for success – then communicate, train and equip you to achieve your goals. (See our list of independent Franchise Awards at the end of this packet.)

## Favorable Demographics, Trends, and Economics

Backyard bird feeding and nature hobbies continue to grow in popularity in North America. Over the years, we have found that the bird feeding community feeds and cares for their birds just as they do their other household pets.

## Low Investment/ Low Franchise Fees

Start-up fees for your Wild Birds Unlimited franchise range between \$170,382 - \$281,606 which includes our franchise fee of \$40,000. Royalties remain at a modest 4% of sales.

## Flexibility

Wild Birds Unlimited, Inc. provides purchasing programs with many of our approved vendors, but you have the flexibility to seek out new vendors that reflect your local culture and cater to the interests of your customers.

## Repeat Business

Our business model is based on the sale of a consumable, bird seed, which our customers return again and again to purchase. This aspect, along with our Daily Savings Club<sup>®</sup> loyalty program provide you with a solid foundation to build a loyal customer base to support the growth of your business.

## E-commerce - MyWBU Store

MyWBU Store allows individuals to shop from the comfort of home and have items delivered to their front door or scheduled for in-store pick up. The Principals can select from an array of more than 350 core products to put on their localized MyWBU Store website and change that offering in real time to accommodate inventory availability.

## Part-time Staff

Typically each store location requires only three part-time hired staff members to start out. As volume increases in the store, more staff will be required.

## Common Traits of Our Franchise Store Owners

If you can see yourself in any of the following profiles, then Wild Birds Unlimited may be a good fit for you:

### Good People Manager

As a Wild Birds Unlimited franchise store owner, much of your success will depend on how well you manage and train your staff. Remember, this is a retail business, so teaching your staff how to enhance sales by delivering an exceptional customer experience will directly affect your bottom line.



“One thing I love about this franchise is the quality of everything, and the support! We are the local experts at what we do but that is because we have this franchise behind us. It's not like some other brands where everything you do is set in stone. For example, we have a little more latitude as far as carrying different products. We worked with our WBU coaches to initially help set up our store. This was a new type of business for me, and so was the retail end of it. There was a learning curve, but I know business, and we just followed the WBU system.”

**Warren & Courtney French –  
Fredericksburg, VA**

### Entrepreneurial Spirit

If you are seeking an opportunity which provides independence, flexibility and leadership, and are driven to provide a quality lifestyle for yourself and your family, you will find common ground among our owners.

### On a Mission

Most of our franchise store owners are bird and nature enthusiasts. Their mission in life is to enlighten their community about backyard bird feeding and other natural subjects. Combine this mission with a great business sense, and your business will FLY!

### Builders

A growing number of Wild Birds Unlimited franchise store owners own and operate multiple stores. While still actively involved in the operation of their stores, these owners excel in building management teams and they enjoy the process of ownership from an enterprise point of view. Other owners enjoy building and developing the business of a single unit franchise. Our operating principals support either strategy.

# Criteria for Ownership

After more than 35 years in business, our experience has proven that a strong Wild Birds Unlimited franchise store owner must be committed to:

## The Best Practices of Wild Birds Unlimited

Don't try to go it alone. The reason you are buying our franchise is because of our brand and our expertise. We know what works and what doesn't work because our franchise store owners provide us detailed feedback on our best practices. We are constantly evolving and improving. Trust our system. It works!

## Commitment

Your business needs your commitment. While our best practices, training, communication and support will be your foundation, ultimately it is your commitment to implementation and follow-through that will make you successful.

## Customer Service

Customers today are craving an exceptional shopping experience. We have put years of research into serving our customers well and they show their appreciation through their loyalty. Put your commitment into providing the best possible customer experience and you will reap the rewards.



## Community

Giving back to your community through local partnerships in nature education is a wonderful way to raise awareness for your business, attract new customers, foster loyalty, and develop community support. Don't miss these opportunities!

### Wild Birds Unlimited Partners in Nature

National Audubon Society  
Bird Studies Canada  
Cornell Lab of Ornithology  
North American Bluebird Society  
Roger Tory Peterson Institute of Natural History

### The Wild Birds Unlimited Pathways to Nature Conservation Fund

[www.pathwaystonature.com](http://www.pathwaystonature.com)

### The Wild Birds Unlimited Pathways to Nature for Kids

[www.pathwaysforkids.com](http://www.pathwaysforkids.com)



## Costs

The chart below outlines the **Anticipated Start-up Expenses** for a Wild Birds Unlimited franchise. Please note we also require Liquid Capital of **\$40,000-\$50,000**.

### Anticipated Start-Up Expenses for a Wild Birds Unlimited Franchise

Franchise Fee	\$40,000	–	\$40,000
Training Fee	\$5,000	–	\$5,000
Travel, Meals and Lodging	\$1,000	–	\$6,000
Rent Deposit	\$3,000	–	\$7,500
First Month's Rent	\$3,000	–	\$7,500
Leasehold Improvements	\$9,329	–	\$54,748
Insurance (Annually)	\$500	–	\$2,500
Legal/Accounting	\$750	–	\$9,750
Office Equipment	\$8,494	–	\$11,949
Signs	\$3,800	–	\$8,600
Opening Advertising	\$7,670	–	\$12,232
Retail Fixtures	\$16,842	–	\$24,905
Opening Inventory	\$25,870	–	\$32,645
Miscellaneous	\$4,347	–	\$6,497
Gift Cards	\$100	–	\$100
MyWBU.com	\$1,180	–	\$1,180
Additional Funds	\$39,500	–	\$50,500
<b>TOTAL</b>	<b>\$170,382</b>	<b>–</b>	<b>\$281,606</b>

Actual start-up costs will vary from store to store depending on location, size of store, local retail rental rates, time of year and available capital. All costs are in US Dollars.

#### Continuing Support Fees:

Royalties - 4% of Gross Sales

Advertising Fund - 1% of Gross Sales

# Development Timeline and Process

You can expect to spend about 60-90 days exploring our franchise opportunity and completing the discovery process for becoming a Wild Birds Unlimited franchise store owner. If we decide to move forward and you sign your franchise or reservation agreement, we will assist you in identifying your retail location and assist you in the build-out and opening of your store. Here are the steps you will take from initial contact to store opening.



## 1 Contact Us

On the next page, you will find our website, phone number and email address. Please contact us to set up your introductory call with a member of our Franchise Development team. We will direct you to our online module called “A Bird’s Eye View” which is a wonderful introduction to our business. At the end of this module we will invite you to complete our short online qualification form.

## 2 Introductory Call

During our first call, we’ll spend some time getting to know each other. We’ll talk about you and your goals for owning your franchise and we will answer your specific questions regarding the Wild Birds Unlimited franchise opportunity. We will also verify initial qualifications for franchise ownership. Once qualified, you will have access to “A Soaring Opportunity,” our second online module.

## 3 Get to Know our Franchise Store Owners

We call this our “validation” step. We look forward to connecting you with our franchise community so that you can visit our stores and make calls to learn more about the Wild Birds Unlimited franchise experience from an owner’s perspective. Our third online module, “Seeds of Success” will now be available for your review.

## 4 Franchise Disclosure Document (FDD)

The FDD will be sent to you either electronically or by mail. We will give you time to review this legal representation of the Wild Birds Unlimited franchise opportunity. In the FDD you will find a summary of financial performance for our franchise stores as well as in-depth information about our processes and operations. We will schedule a phone call to discuss each element in the FDD, usually within 10 days of your receipt of the document.

## 5 Business Planning

Our business planning process includes an in-depth look at our comprehensive support services for all elements of franchise operation. We will provide you access to a sample Business Plan along with Financial Projection worksheets and detailed information about 3rd Party Financing options via “Learning How to Fly,” our fourth online module.

## 6 Meet the Flock

Once we have reviewed your Business Plan, we may invite you to attend our “Meet the Flock” day at the Franchise Support Center in Carmel, Indiana. On this day, you will meet the staff who will be supporting you in your business and you will have the opportunity to ask more detailed questions. We will mutually make the decision as to whether we think the Wild Bird Unlimited franchise is a good fit for you. If we agree to move forward, you will be invited to sign a Franchise Agreement or a Reservation Agreement. This is a very exciting day!



Franchise Support Staff in Carmel, Indiana –  
Founder & CEO Jim Carpenter, Front Row - Center

“After spending many years in “corporate America” in a variety of C-Level roles, it’s so refreshing to work with a team of people who are completely invested in our success as franchisees. It feels like we’ve become part of a large extended family.”

**Amy Legg – Lake Forest Park, WA;  
Warson Woods, MO; St. Charles, MO;  
Austin, TX**

## 7 Site Selection/ Lease Negotiations

While you are researching possible sites for your store, we will provide you with access to our site selection criteria and process. We will offer you expertise and assistance to help you with your final selection...but, it doesn’t stop there. We offer assistance with your lease negotiations as well.

## 8 Training

As you prepare to open your Wild Birds Unlimited store, you will be guided and supported in every aspect of the store opening process. We provide you with a step-by-step action plan and checklist to help you progress toward grand opening day with confidence! Comprehensive class room training includes five days at the Franchise Support Center in Carmel, Indiana as well as five days of in-store training at one of our approved “Certified Training” store locations. This training will help you learn and put into action the Wild Birds Unlimited best practices, which give you a strong foundation to reach your goals.

## 9 Grand Opening!



## Honors and Awards

For a full list of Wild Birds Unlimited, Inc.'s Honors and Awards, please see our website at [wbufranchise.com/honors-awards](http://wbufranchise.com/honors-awards).

## Are you ready to take the next step?

We would love to hear from you! If you are feeling excited about what you've read so far, we encourage you to contact us today to learn more.

### Our Contact Information:

#### **Wild Birds Unlimited, Inc.**

11711 North College Ave., Ste. 146  
Carmel, IN 46032

**Toll Free:** 1-888-730-7108

**Email:** [pickettp@wbu.com](mailto:pickettp@wbu.com)

**Web:** [www.wbufranchise.com](http://www.wbufranchise.com)

“I had a wonderful experience with the WBU Franchise Development process. It is a logical step-by-step process that provides the time and information you need to make a decision on whether WBU is a good fit for you and whether you are a good fit for WBU.

After I made the decision to become a franchisee and I paid the franchise fee, I continued to receive excellent support from the Franchise Development team. I believe the WBU Franchise Development process put me in a position to meet my goals as a WBU franchisee.”

**Hal Smith – Auburn, AL**