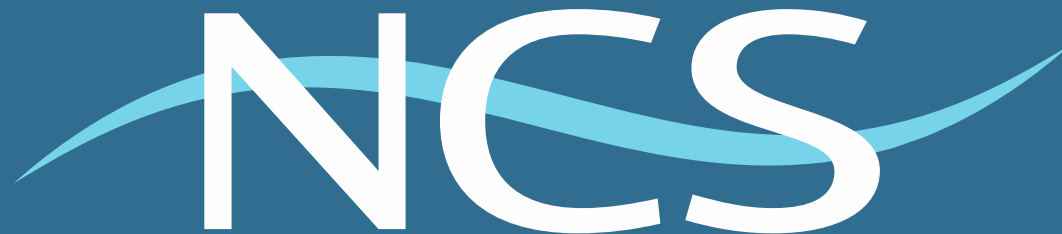


WELCOME



YOUR CARWASH EXPERT

NEW INVESTMENT SEMINAR

- **Introductions**
- **Announcements**
- **Course Expectations**

Who is NCS?

ONLY NATIONWIDE SERVICE NETWORK AND 3X THE NEXT LARGEST PROVIDER

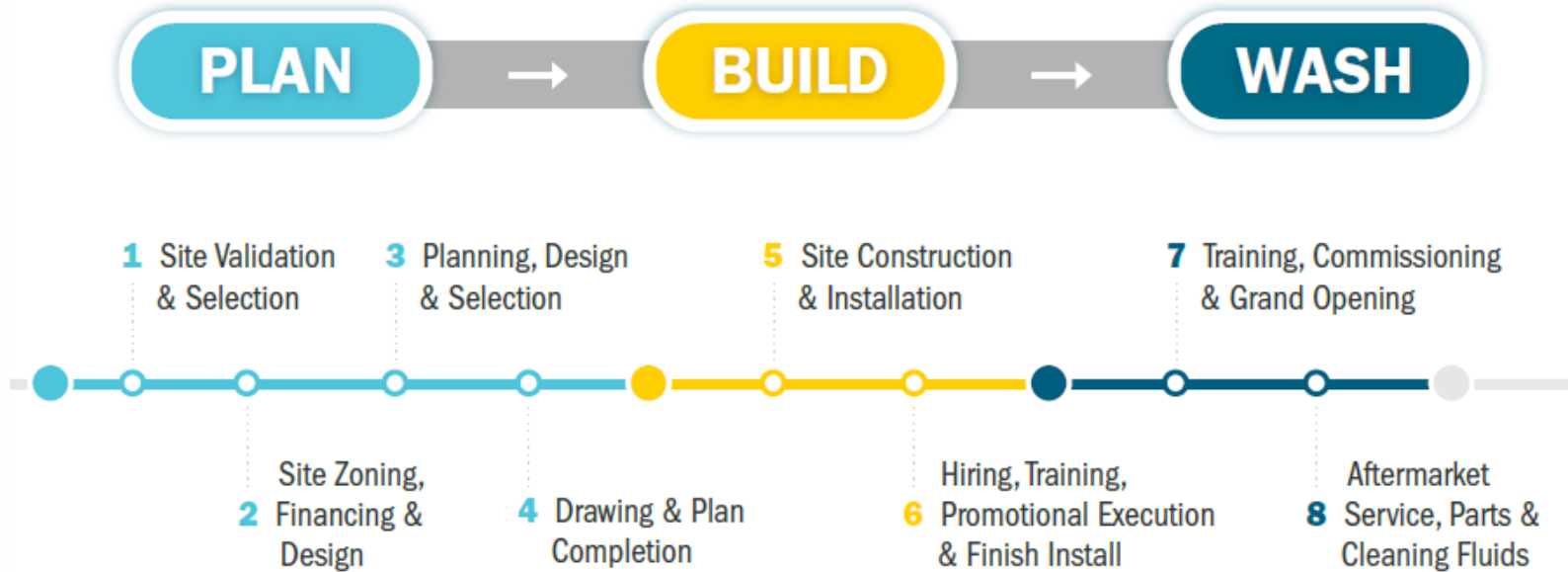
THE MOST COMPLETE, RELIABLE SYSTEM OFFERING WITH LEADING MARKET SHARE

INTEGRATED BUNDLING OF SYSTEM, SERVICE, AFTERMARKET PARTS AND CLEANING FLUIDS

DIRECT GO-TO MARKET STRATEGY THAT CAN DELIVER SERVICE CERTAINTY

SINGLE POINT OF ACCOUNTABILITY

How can NCS help?





APDG A Plus Design Group







VACUTECH





Equipment Finance

Turn-Key Total Project Finance

Real Estate Finance

Refinance

Remodel/Expansion Finance



I. Car Wash Business Formats

Page 17-22

Flex Serve



Express Exterior



In-Bay Automatic



Self Serve



II. Industry Overview

Page 23-26

28

Percentage of respondents with "much greater" car counts in 2015 compared to 2014.

44

Percentage of respondents with "greater" car counts in 2015 compared to 2014.

72

Percentage of conveyor operators who said yes or maybe when asked about expansion in next 12 months.

51

Percentage of in-bay automatic operators who said yes or maybe when asked about expansion in next 12 months.

The car wash industry is experiencing tremendous growth & profitability

- **\$24 Billion in Annual Revenues**
- **Up to 4% Annual Growth**
- **50,000 car washes in North America**
- **15,000 Express Tunnels in North America**

Industry Observations



III. Personal Assessment

Page 27-30

Are you a Good Fit?

- Planning
- Organizing
- Controlling
- Staffing

Financial Responsibilities

- Scrutiny
- Capital
- Comfort
- Professionals
- Risk

Personality Profile: The 6 M's

1. Motivated

4. Mechanical

2. Managerial

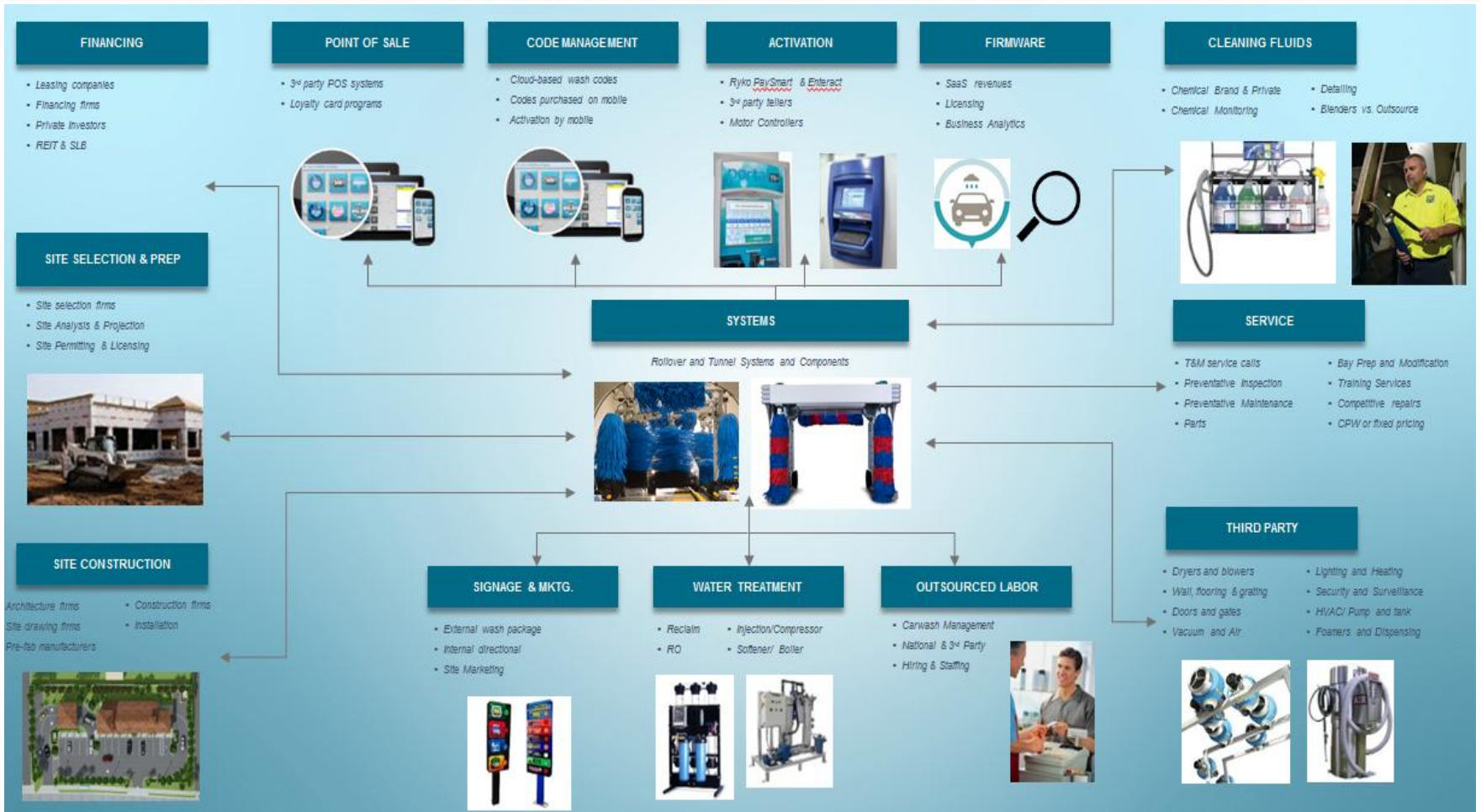
5. Malleable

3. Marketer

6. Meticulous

IV. Role of an Industry Advisor

Page 31-32



V. Site Selection

Page 33-37

Demographic report



1. Area Type
2. Area Trend
3. Predominant Area Ages
4. Population Density
5. Household Income

6. Competition

7. Utilities Available

8. Site Visibility

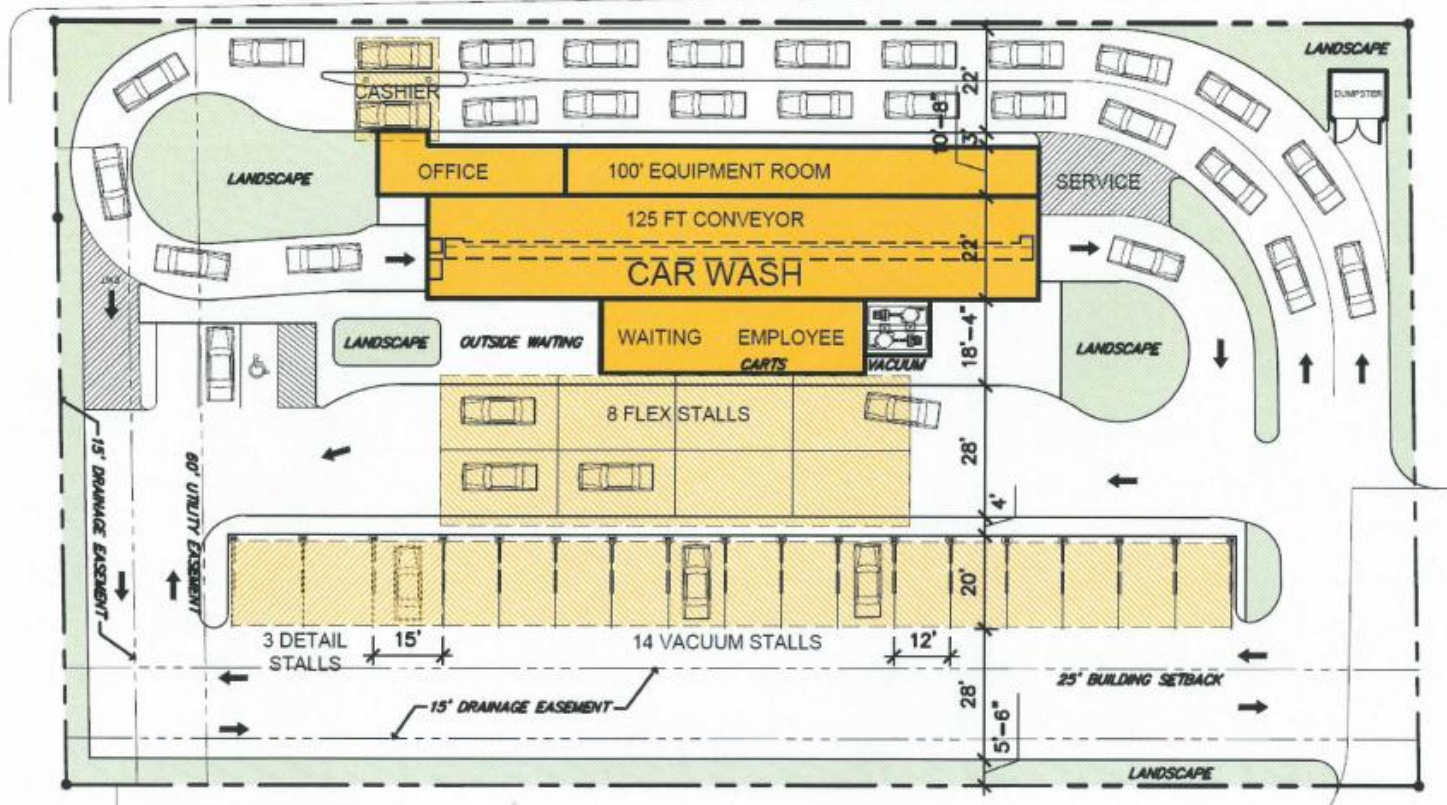
9. Signage Capability

10. Daily Traffic Volume

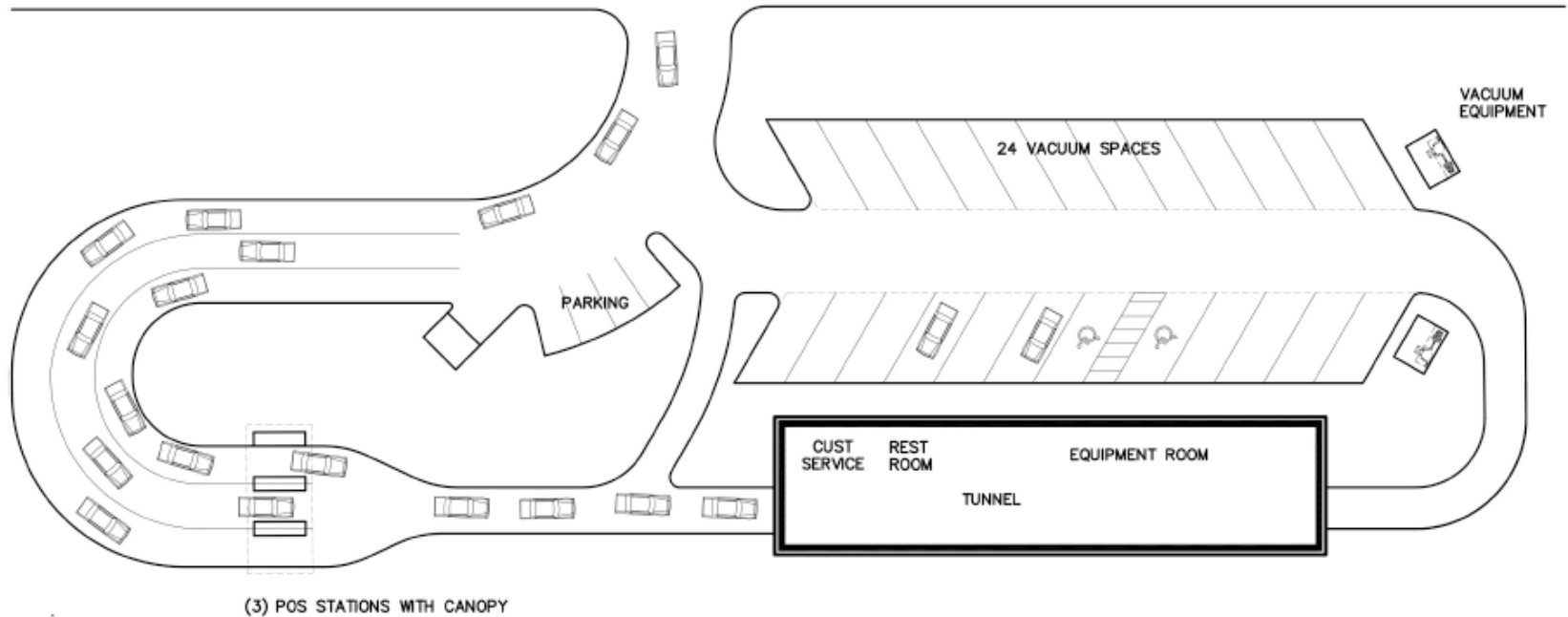
VI. Site Layout

Page 38-44

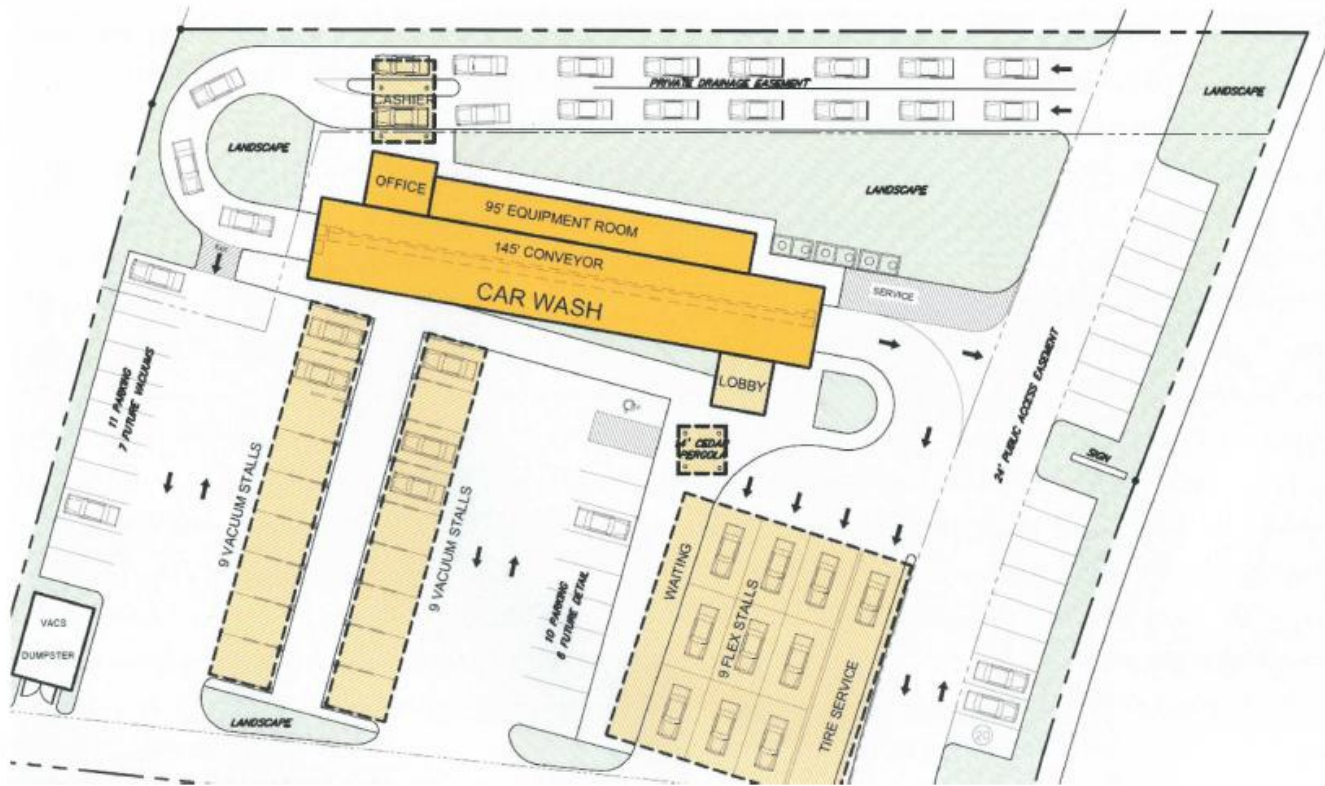
Flex Serve



Express Exterior



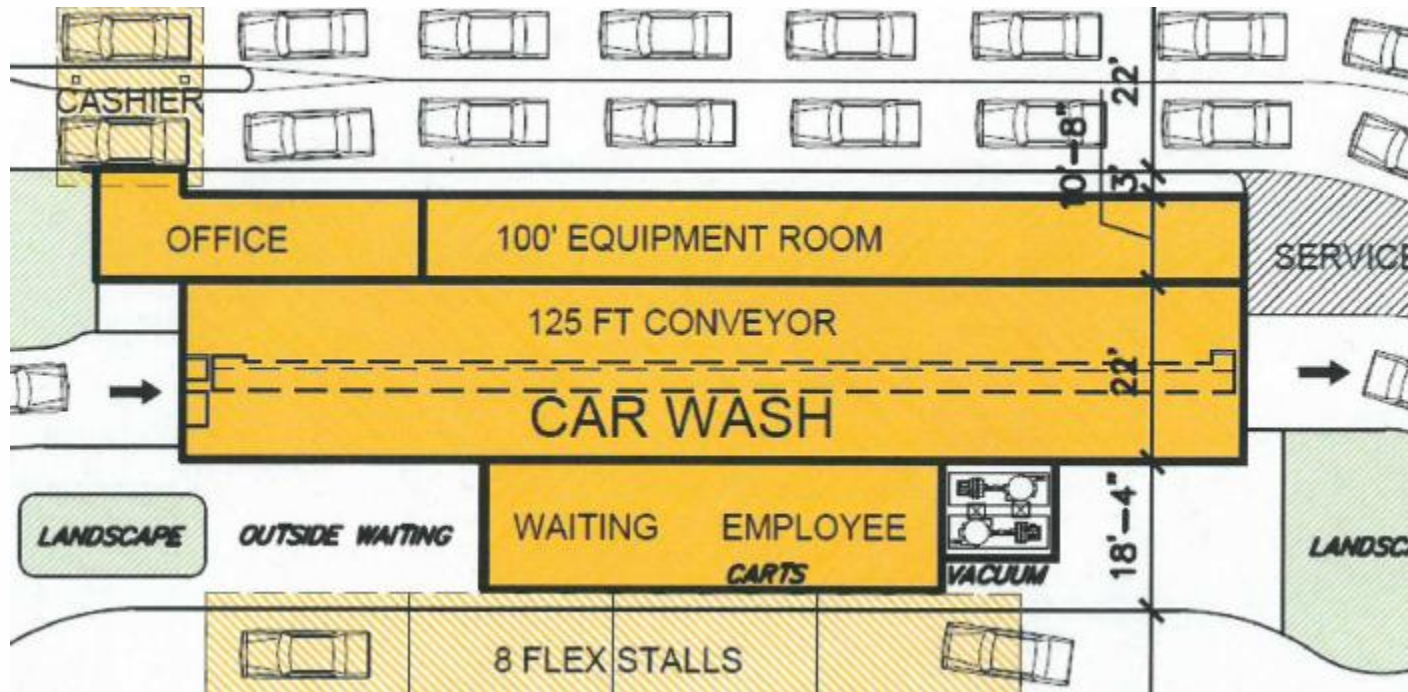
Mixed Set of Bays



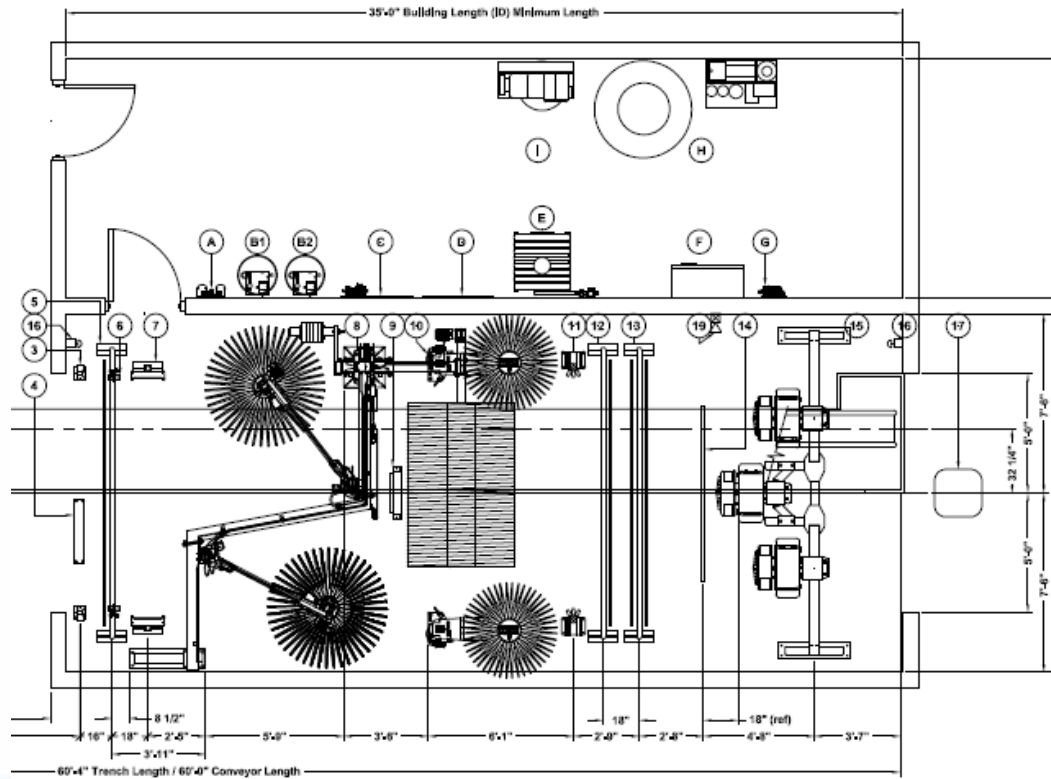
VII. Building & Bay Layout

Page 45-52

Considerations

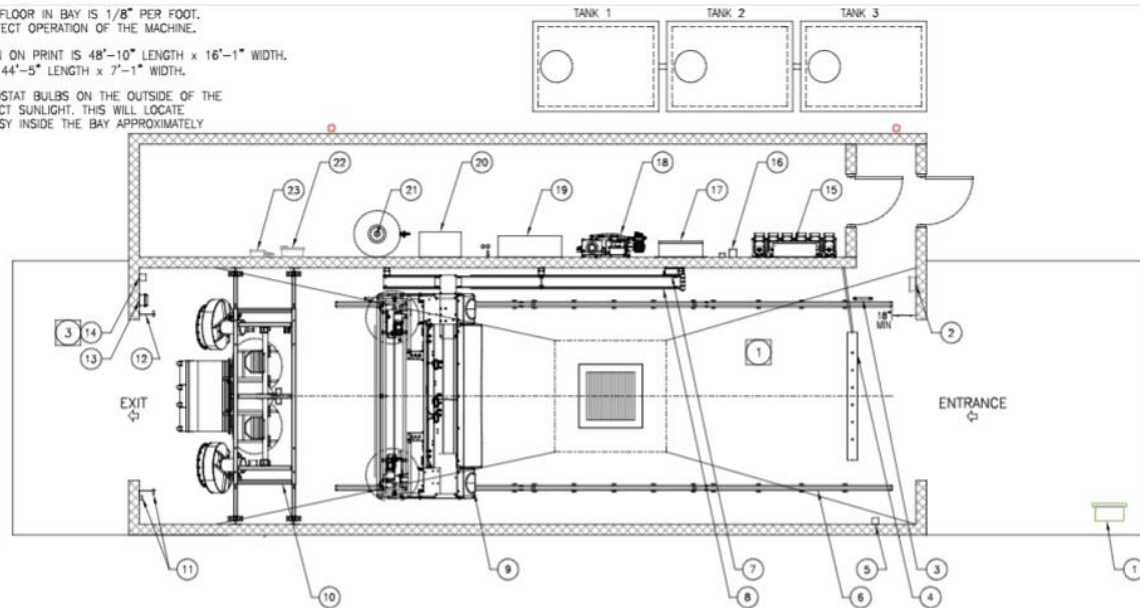


In-Bay Express

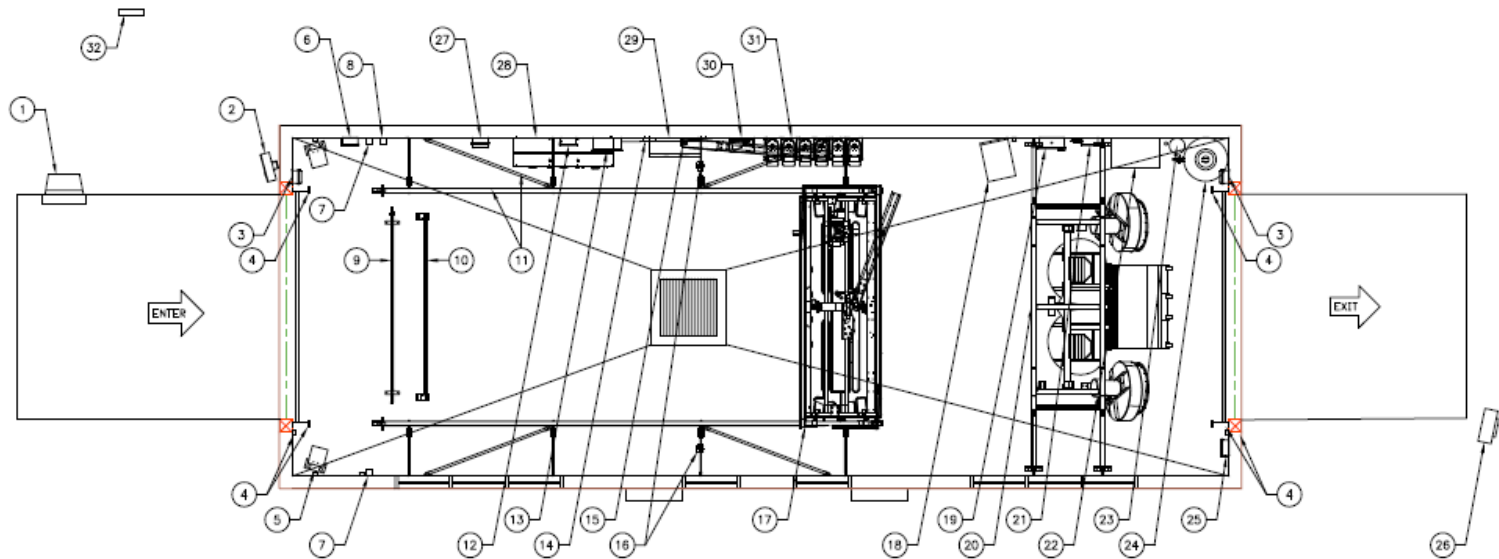


SoftGloss Maxx3- Friction Rollover

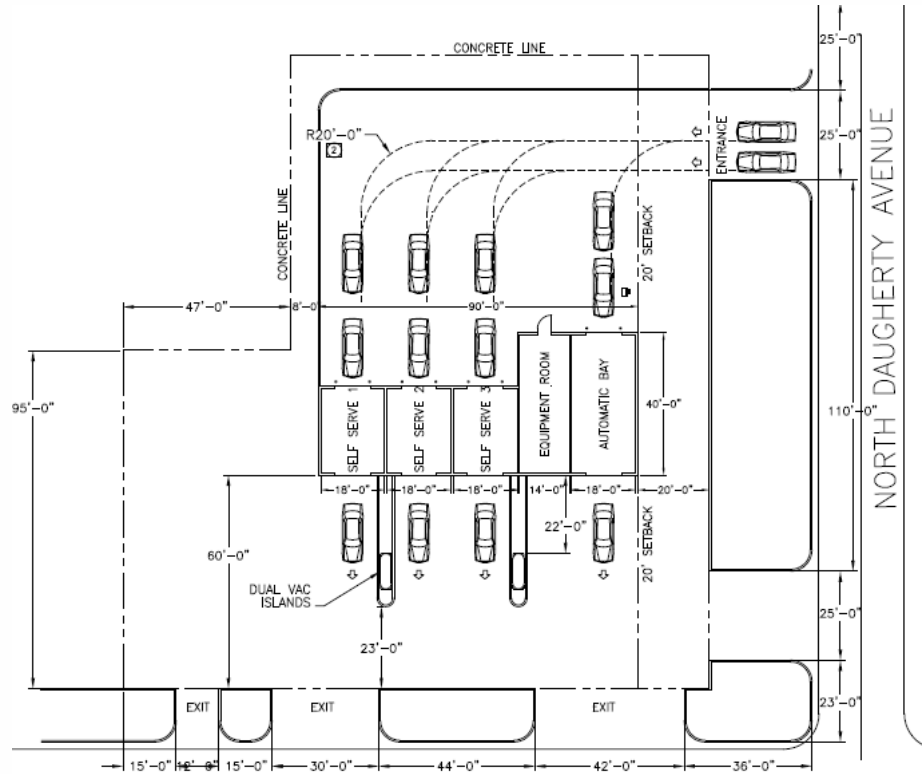
- 1 RECOMMENDED SLOPE OF FLOOR IN BAY IS 1/8" PER FOOT. EXCESSIVE SLOPE MAY AFFECT OPERATION OF THE MACHINE.
- 2 SIZE OF WASH BAY SHOWN ON PRINT IS 48'-10" LENGTH x 16'-1" WIDTH. EQUIPMENT ROOM SIZE IS 44'-5" LENGTH x 7'-1" WIDTH.
- 3 FIRST LOCATE THE THERMOSTAT BULBS ON THE OUTSIDE OF THE NORTH WALL, OUT OF DIRECT SUNLIGHT. THIS WILL LOCATE THE DUAL THERMOSTAT ASSY INSIDE THE BAY APPROXIMATELY 4FT AWAY.



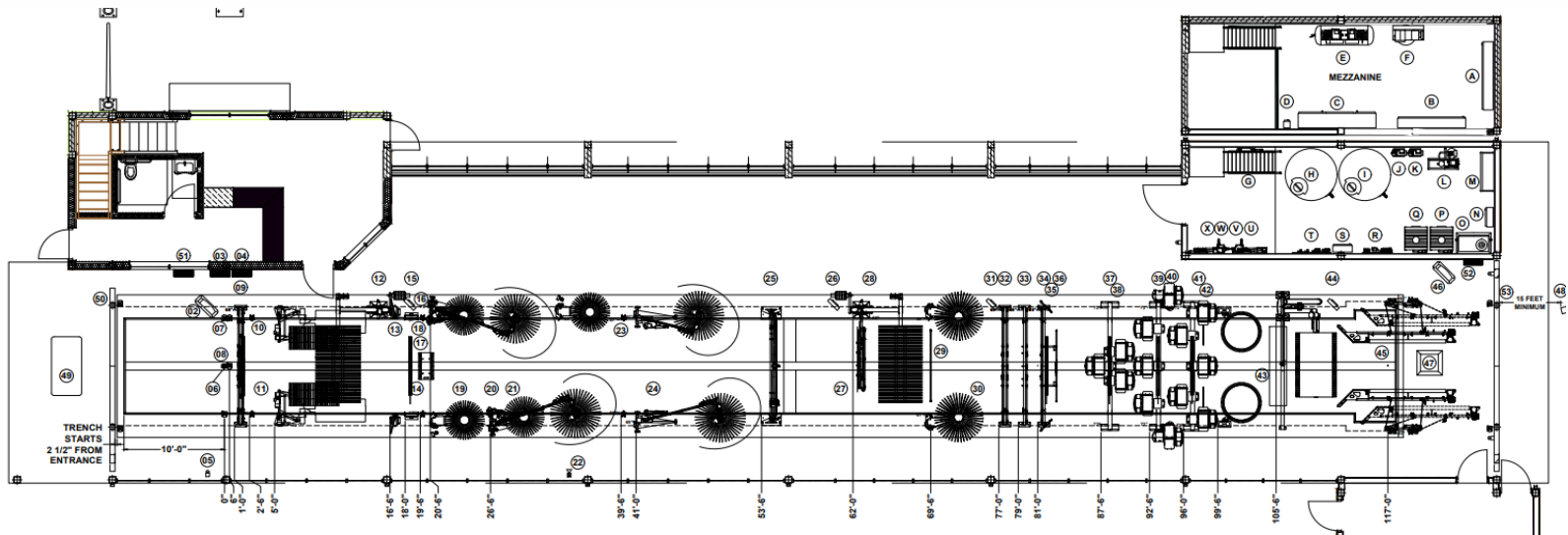
Radius – Touch-Free Rollover



One IBA, Three Self-Serve



Flat Top Conveyor



VIII. Site Development

Page 53-57

Project Plan Stages

1. Plan
2. Design
3. Refine
4. Coordinate
5. Build
6. Launch

Project Plan Personnel

- Advisor
- Distributor
- Marketing
- Financial
- Attorney
- Architect/Engineer
- Contractor



IX. Operations Pro Forma

Page 58-62

Project Plan Stages

1. Site Analysis Processing Data: Location Characteristics
2. Capital Expenditure & Financial Projections
3. Break Even Analysis: Year 1
4. Break Even Analysis: Performance Data, Summary Table
5. Performance Table Summary: Annual KPI Summary by Analysis Model

X. Financing

Page 64-67

XI. Business Plan

Page 68

Keys to Success

Page 69

1. Clean, Shiny, Dry Vehicles
2. Amazing Customer Experience
3. Energetic Marketing
4. Site Selection & Development
5. A Good Team
6. Great Training, Procedures, & Policies
7. Equipment & Site Maintenance
8. Continuing Education and Industry Involvement



Meet & Greet Reception

