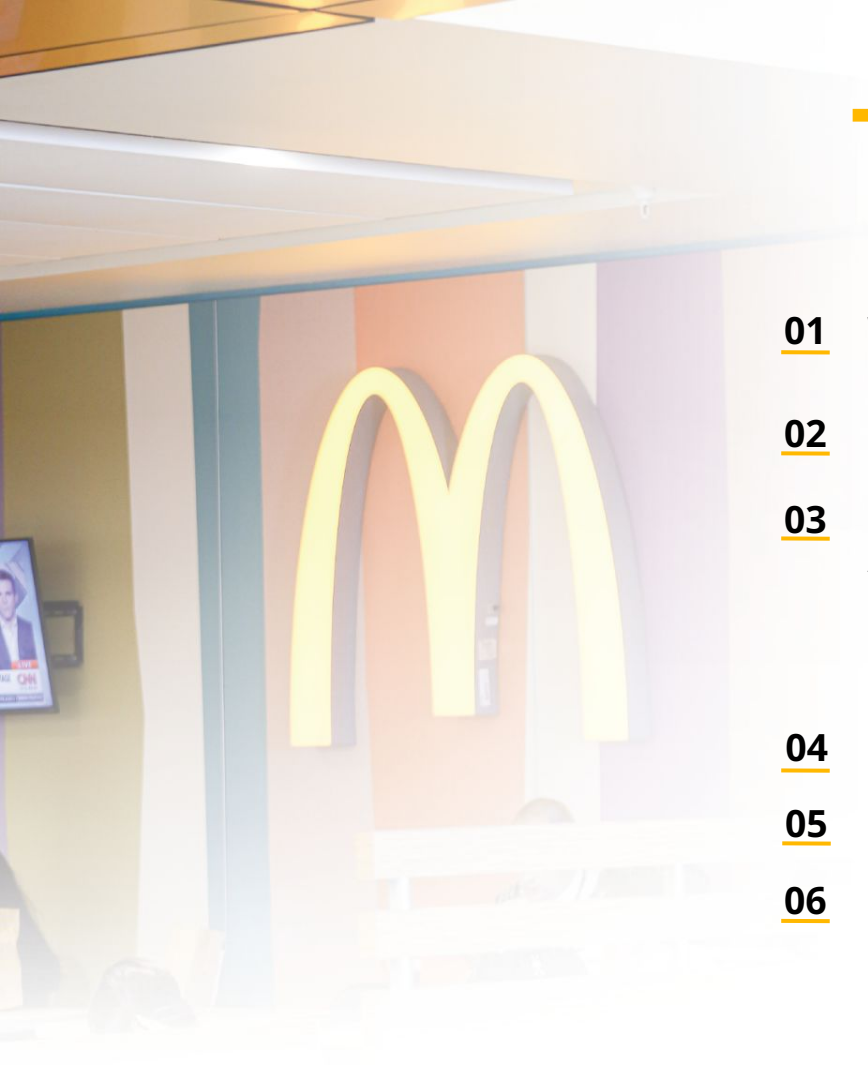
WOMEN OWNERS NETWORK

WON Workshop

2026 McDonald's Franchisee Ownership Policies:

What to Know, Why They Matter, When to Act

October 30th, 2025



Today's Agenda

01 **Welcome |** Julie Pernecky, WON West Zone Lead

02 **Introduction |** Diane Piraino-Koury, WON NFLA Franchising Team Rep

03 **McDonald's Franchisee Ownership Policies**
Amy Johnson, McDonald's USA, Director Franchise Relations
Dana Weller, Director, US Franchising Strategy
Laura Eichler, Franchising Manager, US Franchising Strategy
Deb Fisher, Field Franchising Manager, US Franchising Strategy

04 **Q&A|** Julie Pernecky, WON West Zone Lead

05 **Future Franchisee Program|** Jamie Black, WON FFP Lead

06 **Closing |** Maria Acosta, WON Vice-President

Welcome

Julie Pernecky, WON West Zone Lead

Introduction

Diane Piraino-Koury, WON NFLA Franchising Team Rep

Available Resources

WON FOAs

West Zone Field Office Advocates		
Dallas	Pat Roetzel	214-668-8628
Denver	Lauren Holmberg	720-231-9865
Long Beach	Kerri Harper-Howie	310-251-5639
Nashville	Dena Querternous	731-445-4863
Walnut Creek	Kara Campbell	435-724-8426

East Zone Field Office Advocates		
Atlanta	Andree Kocian	518-275-9212
Bethesda	Amanda Holder-Giles	631-742-1486
Chicago	Trina Gendron	779-348-2024
Columbus	Amy Ansel	330-827-5006
Stamford	Diane Piraino-Koury	908-310-2919

US Franchising Strategy

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WON Franchising Rep

Diane Piraino-Koury | 908-310-2919

WON Website

www.wonmcd.com

Access workshop recordings, learn all about WON, plan for upcoming events, explore resources exclusive to members, and more!

WON Franchising Overview

US Franchising

Amy Johnson
McDonald's USA,
Director Franchise Relations

Dana Weller
Director,
US Franchising Strategy

Laura Eichler
Franchising Manager,
US Franchising Strategy

Deb Fisher
Field Franchising Manager,
US Franchising Strategy

AGENDA

What to Know Now: Current structure and resources available

- What is your ownership structure on the franchise agreement?
- Who is the approved franchisee(s)?
- When do my franchises expire?
- Who is the Field Franchising Manager that supports my field office who can assist in answering these questions?

What to think about for the Future: Looking ahead and preparing for change

- What are the new 2026 ownership policies?
- When will these policies impact me?

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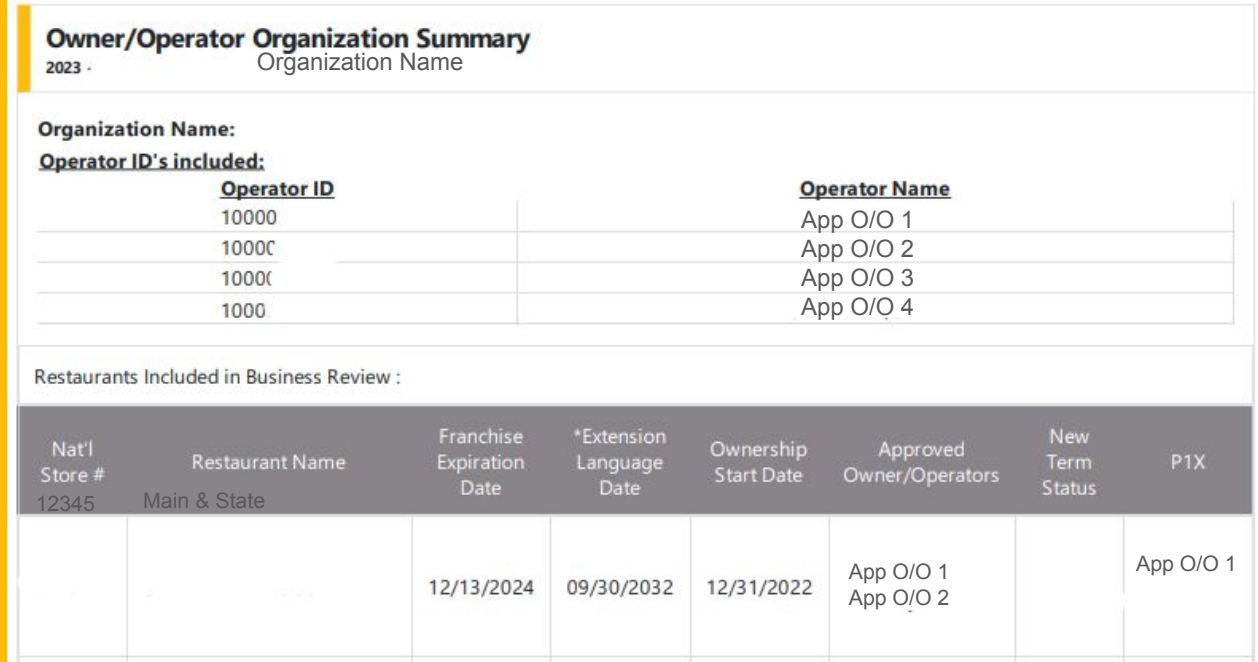
Understanding your Current Ownership Structure

Resources to Find Ownership:

- Franchise Agreement for Each Restaurant
- Business Review Report
  - Approved O/O & Term Expirations



Owner/Operator Organization Summary
2023 - Organization Name

Organization Name:

Operator ID's included:

Operator ID	Operator Name
10000	App O/O 1
1000(	App O/O 2
1000(	App O/O 3
1000	App O/O 4

Restaurants Included in Business Review :

Nat'l Store #	Restaurant Name	Franchise Expiration Date	*Extension Language Date	Ownership Start Date	Approved Owner/Operators	New Term Status	P1X
12345	Main & State	12/13/2024	09/30/2032	12/31/2022	App O/O 1 App O/O 2		App O/O 1

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Franchising Information

2026 Policy Reminders

Basic Estate Planning Booklet

Becoming a McDonald's Owner/Operator Candidate Program Booklet

Main Contact

West Zone	Field Franchising Manager	New Term Manager
Dallas, Long Beach, Walnut Creek	Lori Case 985.707.2078	Laura Eichler
Denver, Nashville	Deb Fisher 414.651.6966	Laura Eichler

East Zone	Field Franchising Manager	New Term Manager
Atlanta, Chicago, Columbus	Jason Haney 412.304.2176	Kyle Dooley
Bethesda, Stamford	Sarah Beaudoin 860.471.5521	Kyle Dooley

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Ownership Policies 2026 & Beyond

- Only one Owner/Operator can have approved Operator status on the new term franchise, except for a spouse.
- Equity ownership is limited to the approved owner/operator (minimum 51% interest), his/her spouse, and/or children.
- Parents can maintain a minority equity ownership up to 49% if the parent is approved on at least one other restaurant in the organization and the restaurant has been in the organization as of 12/31/2022.

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Scenarios

How to apply the franchising changes:

- Newly QTB NG Candidate
- New Term
- Family SBO
- 3rd Party SBO

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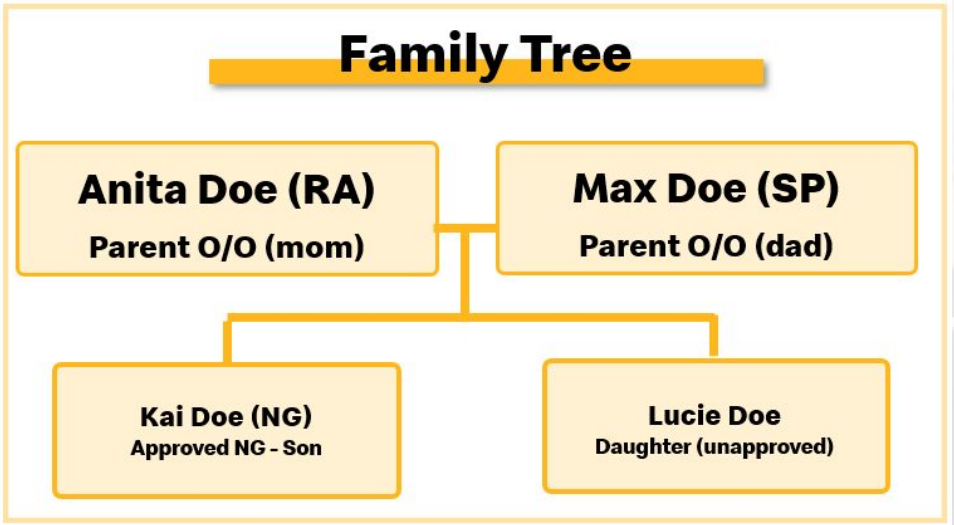
Family Organization Structure

The Anita, Max and Kai Doe organization consists of 5 restaurants with 3 approved Owner/Operators and one unapproved daughter (Lucie). Mom (Anita), her spouse (Max) and their next gen son (Kai) are the 3 approved O/O's currently in the organization. Each of their 5 restaurants has different ownership and equity structures.



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Ownership Policy Decision(s) | EXAMPLE DOE ORGANIZATION

NSN 1234

Term Exp. 7/31/26

Current Ownership #1234

Owner	Approval Status	Equity
Kai Doe – Next Gen(NG)	Approved	80%
Anita Doe – Parent (RA)	Approved	10%
Max Doe – Spouse (SP)	Approved	10%

NSN 2345

Term Exp. 7/31/30

Current Ownership #2345

Owner	Approval Status	Equity
Anita Doe – Parent (RA)	Approved	80%
Kai Doe – Next Gen (NG)	Approved	20%

NSN 4321

Term Exp. 7/31/30

Current Ownership #4321

Owner	Approval Status	Equity
Anita Doe – Parent (RA)	Approved	80%
Kai Doe – Next Gen (NG)	No	20%

NSN 6789

Term Exp. 12/31/35

Current Ownership #6789

Owner	Approval Status	Equity
Anita Doe – Parent (RA)	Approved	100%

NSN 9999

Term Exp. 12/31/35

Current Ownership #9999

Owner	Approval Status	Equity
Anita Doe – Parent (RA)	Approved	51%
Lucie – Daughter	No	49%

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Qualified-to-Buy Next Gen Candidates

- **First restaurant:** Once the NG candidate successfully completes the training program, they are required to obtain 100% equity ownership within 12 months of the Qualified-to-Buy date.

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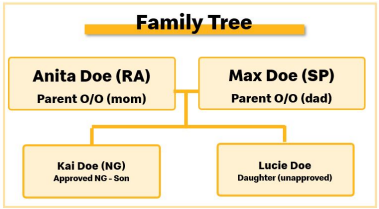
Ownership Policy decision(s) Qualified to Buy NG Candidate | EXAMPLE

NSN
9999

TERM EXP.
12/31/35



Current Ownership #9999

Owner	Approval Status	Equity
Anita Doe- Parent	Approved	51%
Lucie Doe- Daughter	No	49%

Decision required for QTB Next Gen Candidate: ***What restaurant will she be approved with 100% equity?***

*Organization must meet criteria in NEW Growth Policy

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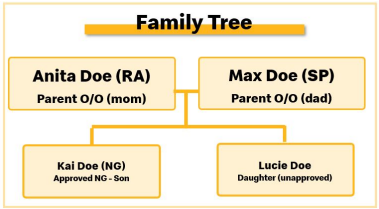
Ownership Policy decision(s) Qualified to Buy NG Candidate | EXAMPLE

NSN
9999

TERM EXP.
12/31/35



Current Ownership #9999

Owner	Approval Status	Equity
Anita Doe- Parent	Approved	51%
Lucie Doe- Daughter	No	49%

Qualified to Buy Candidate Ownership – First Restaurant

Owner	Approval Status	Equity
Lucie Doe Daughter (NG)	Approved	100%

Decision required for QTB Next Gen Candidate: ***What restaurant will she be approved with 100% equity?***

*Organization must meet criteria in NEW Growth Policy

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Ownership Policy at New Term | EXAMPLE A

NSN 2345

TERM EXP. 7/31/30

Current Ownership – Restaurant in organization as of 12/31/22

Owner	Approval Status	Equity
Anita Doe – Parent (RA)	Approved	80%
Kai Doe – Next Gen (NG)	Approved	20%

Decision required at New Term: Who will be the one approved O/O at new term?

If Anita remains the approved O/O

Owner	Approval Status	Equity
Anita Doe – Parent (RA)	Approved	80%
Kai Doe – Next Gen (NG)	No	20%

- Next Gen comes off as Approved O/O as only one Approved O/O allowed BUT maintains equity
- No equity changes needed - Both parent and NG can have equity. Approved O/O needs to have a minimum of 51%

- Family SBO - Organization must meet criteria in Growth Policy

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Ownership Policy at New Term | EXAMPLE A

NSN 2345

TERM EXP. 7/31/30

Current Ownership – Restaurant in organization as of 12/31/22

Owner	Approval Status	Equity
Anita Doe – Parent (RA)	Approved	80%
Kai Doe – Next Gen (NG)	Approved	20%

Decision required at New Term: Who will be the one approved O/O at new term?

If Anita remains the approved O/O

Owner	Approval Status	Equity
Anita Doe – Parent (RA)	Approved	80%
Kai Doe – Next Gen (NG)	No	20%

- Next Gen comes off as Approved O/O as only one Approved O/O allowed BUT maintains equity
- No equity changes needed - Both parent and NG can have equity. Approved O/O needs to have a minimum of 51%

If Kai (NG) remains the approved O/O

Owner	Approval Status	Equity
Kai Doe – Next Gen(NG)	Approved	51%
Anita Doe – Parent (RA)	No	49%

- Parent comes off as Approved O/O but maintains minority equity as restaurant is in org as of 12/31/22
- Approved O/O must have ≥51% equity so Parent must transfer a minimum of 31% to NG
- Parent needs to be an Approved O/O on another restaurant in the org
- Family SBO - Organization must meet criteria in Growth Policy

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Ownership Policy at New Term | EXAMPLE B

NSN 1234

TERM EXP. 7/31/26

Current Ownership – Restaurant in organization as of 12/31/22

Owner			Approval Status	Equity
Kai Doe	–	Next Gen(NG)	Approved	80%
Anita Doe	–	Parent (RA)	Approved	10%
Max Doe	–	Spouse (SP)	Approved	10%

Decision required at New Term: Who will be the one approved O/O at new term?

If Kai (NG) remains the approved O/O

Owner			Approval Status	Equity
Kai Doe	–	Next Gen(NG)	Approved	80%
Anita Doe	–	Parent (RA)	No	10%
Max Doe	–	Spouse (SP)	No	10%

- Parent and spouse come off as Approved O/O as only one Approved O/O allowed BUT can maintain minority equity
- No equity changes needed
- Parent needs to be an Approved O/O on another restaurant in the organization

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Ownership Policy at New Term | EXAMPLE B

NSN 1234

TERM EXP. 7/31/26

Current Ownership – Restaurant in organization as of 12/31/22

Owner			Approval Status	Equity
Kai Doe	–	Next Gen(NG)	Approved	80%
Anita Doe	–	Parent (RA)	Approved	10%
Max Doe	–	Spouse (SP)	Approved	10%

Decision required at New Term: Who will be the one approved O/O at new term?

If Kai (NG) remains the approved O/O

Owner			Approval Status	Equity
Kai Doe	–	Next Gen(NG)	Approved	80%
Anita Doe	–	Parent (RA)	No	10%
Max Doe	–	Spouse (SP)	No	10%

- Parent and spouse come off as Approved O/O as only one Approved O/O allowed BUT can maintain minority equity
- No equity changes needed
- Parent needs to be an Approved O/O on another restaurant in the organization

If Parent remains the approved O/O

Owner			Approval Status	Equity
Kai Doe	–	Next Gen(NG)	No	39%
Anita Doe	–	Parent (RA)	Approved	51%
Max Doe	–	Spouse (SP)	Approved	10%

- Next Gen come off as Approved O/O as only one Approved O/O allowed BUT can have minority equity
- Approved O/O must have ≥51% equity so NG must transfer 41% to Parent
- Family SBO, therefore, Organization must meet criteria in Growth policy

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Approval on Additional Restaurants

- 51% equity ownership* (no other sibling ownership) – if owned by the Organization as of December 31, 2022.
  - A parent(s), who is currently approved on another restaurant in the organization, can have up to 49% equity interest, but not approval status.

- 100% equity ownership if the restaurant is acquired by the Organization **after** December 31, 2022.

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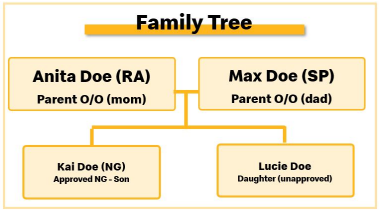
Approval/Ownership Policy: Next Gen Approved on Add'l restaurants | EXAMPLE

NSN
4321

TERM EXP. 7/31/30



Current Ownership #4321: In Organization as of 12/31/2022

Owner			Approval Status	Equity
Anita Doe	–	Parent (RA)	Approved	80%
Kai Doe	–	Next Gen(NG)	No	20%

*Organization must meet criteria in NEW Growth Policy

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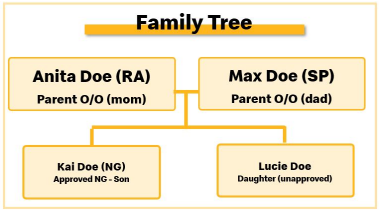
Approval/Ownership Policy: Next Gen Approved on Add'l restaurants | EXAMPLE

NSN
4321

TERM EXP. 7/31/30



Current Ownership #4321: In Organization as of 12/31/2022

Owner			Approval Status	Equity
Anita Doe	–	Parent (RA)	Approved	80%
Kai Doe	–	Next Gen(NG)	No	20%

Family SBO Ownership -Existing Restaurant in Org as of 12/31/22

Owner			Approval Status	Equity
Kai Doe	–	Next Gen	Approved	51%
Anita Doe	–	Parent (RA)	No	49%

*Organization must meet criteria in NEW Growth Policy

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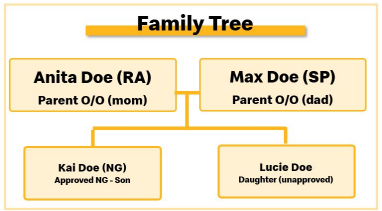
Approval and Ownership Policy decision(s) for Third Party SBO | EXAMPLES A & B

Doe Organization meets the New Growth Policy and is purchasing restaurant #1111 :

NSN
1111

TERM EXP. 7/31/30



Example A:

Organization decides Parent Anita is the Approved O/O:

Owner	Approval Status	Equity
Anita Doe – Parent (RA)	Approved	80%
Kai Doe – Son- (NG)	No	10%
Lucie Doe –Daughter	No	10%

Decision required for 2023 3rd party SBO: *who will be the one approved O/O on the restaurant?*

*Organization must meet criteria in NEW Growth Policy

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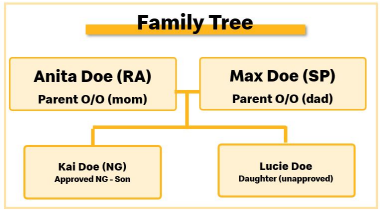
Approval and Ownership Policy decision(s) for Third Party SBO | EXAMPLES A & B

Doe Organization meets the New Growth Policy and is purchasing restaurant #1111 :

NSN
1111

TERM EXP. 7/31/30



Example A:

Organization decides Parent Anita is the Approved O/O:

Owner	Approval Status	Equity
Anita Doe – Parent (RA)	Approved	80%
Kai Doe – Son- (NG)	No	10%
Lucie Doe –Daughter	No	10%

OR

Example B:

Organization decides Next Gen is the Approved O/O for 2023 SBO:

Owner	Approval Status	Equity
Kai Doe – Next Gen (NG)	Approved	100%*

*Kai Doe as the approved majority O/O could give minority equity to his spouse/children up to 49%

Decision required for 2023 3rd party SBO: *who will be the one approved O/O on the restaurant?*

*Organization must meet criteria in NEW Growth Policy

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Q&A / Comments

Future Franchisee Program

Jamie Black, WON FFP Lead

What is the Future Franchisee Program?

- A development and support initiative led by the Women Owners Network (WON), created to guide and empower aspiring Future Franchisees on the path to becoming McDonald's Owner/Operators.
- All Registered Applicant, Spouse, Company Employee, as well as Next Generation Women and Men are welcome to join our Program.
- Your go-to hub for resources, tools, and a strong network for women leaders committed to helping each other succeed.

The WON FFP can provide you with:

- Information on the franchising program
- Key resources to help you on your journey to becoming a Franchisee
- Mentorship and advice from current Owner/Operators
- Access to Informative, Educational and Networking Events
- A powerful community of support

FFP
FUTURE FRANCHISEE PROGRAM
A WON GROUP

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FFP Lead

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Toni Williams

Registered Applicant Owner, Communications

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Trina Gendron

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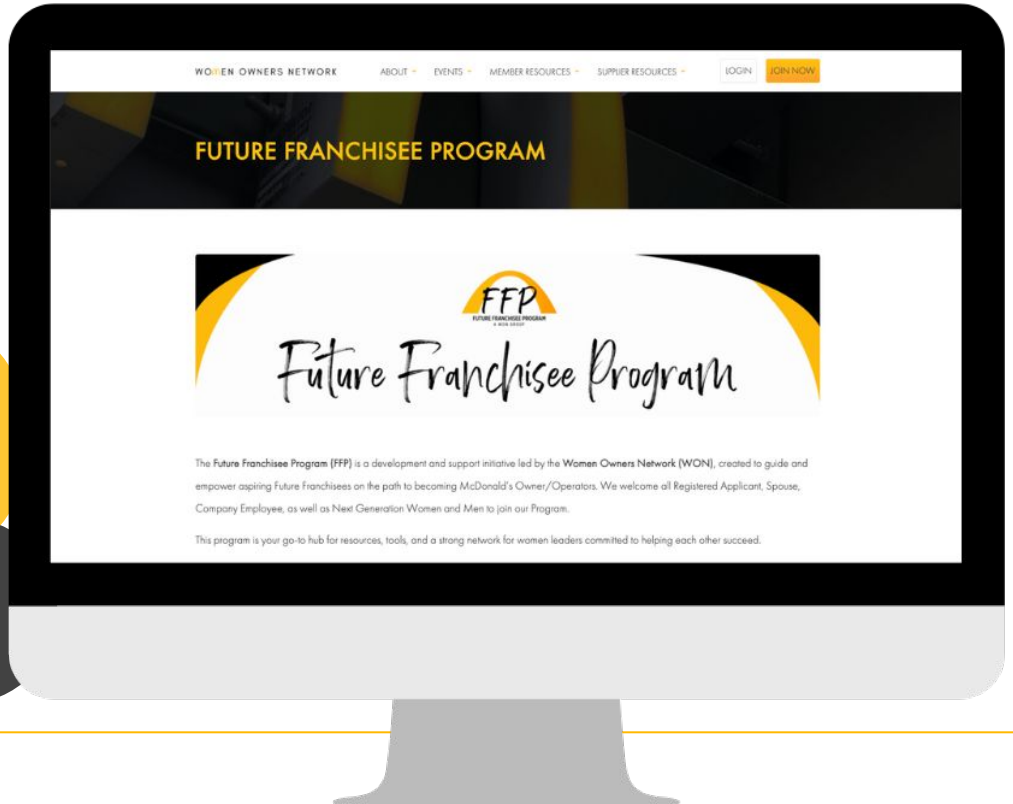
NEW FFP Page on WON Website



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Closing

Maria Acosta, WON Vice-President

Available Resources

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WON Website

www.wonmcd.com

Access workshop recordings, learn all about WON, plan for upcoming events, explore resources exclusive to members, and more!

Thank You!