

A CONCEPT & BUSINESS PLAN

International Gourmet Food & Luxury Gifting

A jewel-box specialty house and gifting studio for North Texas — the concept, the market, the model, and an honest reckoning of the numbers.

SOUTHLAKE • KELLER • TROPHY CLUB

SEPTEMBER 2026

A reasonable chance of modest success — inside \$200,000 — if three lines hold.

You asked for a reality check before anything else, so here is the answer first, plainly. A small international gourmet house built around a gifting engine can clear the bar you set: enough positive cash flow that the friend who operates it makes a living from doing it. It can be built for two hundred thousand dollars. And it can then pay that living from day one while the business itself turns cash-positive in its second year. None of that is guaranteed. All of it is reachable, and it depends on discipline, not luck.

The success test is worth stating in your own words, because the whole plan is measured against it and nothing else: *“I just want to make enough positive cash flow that my friend, who will operate it, can make a living off doing it.”* That is a modest bar, and it is the right one. This plan is sized to clear it, not to build an empire. Judged against “can it make my friend a living?” the honest answer is a reasonable yes.

The three lines that must hold are simple to name and easy to break. Keep the footprint small — a jewel-box of roughly thirteen hundred square feet, not a grocery format. Take a second-generation retail space and finish it light, never a restaurant buildout. And let the gifting business drive revenue, with the retail floor as its storefront and its feeder. Hold those three and the operator's-living bar is within reach. Break any one and two hundred thousand dollars disappears into buildout and slow-turning shelf stock, and the first years bleed before the store ever reaches the modest bar.

The recommended town is Southlake — for the corporate-gifting demand a headquarters town generates, and a customer whose median household income clears a quarter of a million dollars. Keller is the disciplined-budget alternative; Trophy Club the value fallback. The town choice and the go-to-market are one decision, and the reasoning for each is laid out over the pages that follow.

THE THREE LINES THAT MUST HOLD

One. A small footprint — ~1,300 sq ft, a jewel-box, not a market.

Two. A light second-generation buildout — never a restaurant kitchen.

Three. Gifting drives revenue — retail is the storefront and the feeder.

\$193,525

Net startup cost, Southlake premium case with a negotiated allowance — \$6,475 under the \$200,000 ceiling

Year 2

The business turns cash-positive — the operator's living is paid from day one

\$55,000

The operator's salary, paid every month of every year, including the loss-making first year



The wall of provenance. Single-estate oils, aged balsamic, single-origin chocolate, honey, French sea salt, tinned Spanish seafood — breadth of story, not depth of stock. Every jar on the shelf is also a component of a basket.

A room you step into, not a market you push a cart through.

Picture a thirteen-hundred-square-foot jewel-box on a premium corner. Warm light on dark millwork. A wall of imported olive oils, aged balsamics, single-origin chocolate, French sea salt, Spanish tinned seafood, Italian pasta and preserves, English biscuits, small-batch honey and jam. A refrigerated case of cheese and cured meat. A coffee-and-tea wall. And running through all of it, the part that pays the rent: a gifting operation, with a workroom where baskets are built, a bench where a bottle becomes a gift, and a corporate program that ships fifty client-appreciation baskets on a Tuesday in December.

The sell is curation and provenance — this oil is from this hillside, this chocolate from this maker — wrapped in a service that turns provenance into a present. The register is the affluent-suburb specialty room: Eataly's jewel-box logic, the Dean & DeLuca counter, a good European épicerie. Named makers, named origins, real specificity, never “gourmet imports” as a vague gesture.

Provenance

Named makers and named origins — the story is the product.

Curation

Breadth over depth — a jewel-box carries range, not tonnage.

Service

The shelf becomes a gift — provenance turned into a present.

One footprint, two businesses — the floor sells the store, the gifting pays the rent.

THE STOREFRONT & THE FEEDER

The retail floor is the storefront and the feeder.

It is what a stranger walks past and steps into. It is where the smell and the shelves make the case that this is a serious food store. And critically, every item on the shelf is also a component of a basket: the olive oil that sits at twenty-eight dollars on the shelf is the same oil that goes into a hundred-fifty-dollar basket at a better blended margin. The retail inventory is not a separate cost from the gifting inventory. It *is* the gifting inventory, merchandised.

THE PROFIT ENGINE

The gifting operation is the profit engine.

Baskets, wrapping, and corporate gifting carry higher margins than retail grocery and turn faster — a basket is built to order and out the door in days, while shelf stock sits for weeks. And the corporate channel sells in volume, on a date, which is exactly what carries a small store through the quarters when walk-in retail is thin.

WHAT IT IS NOT

It is **not a grocery store**, not a deli with a hot line, not a café with a commercial kitchen. Those formats need square footage and restaurant-grade buildout the two-hundred-thousand-dollar ceiling cannot absorb.

The discipline of the concept is the discipline of the budget. A packaged and prep-and-pack format — assembling baskets and wrapping, no cooking — triggers far lighter health review and buildout than a food-service kitchen with a Type I hood and grease trap.

That single distinction is worth roughly **\$150,000 to \$300,000 in avoided buildout**, and it is the reason the concept fits the budget at all. The store sells packaged and shelf-stable goods and builds gifts from them. It does not cook.

*“The discipline of the concept **is** the discipline of the budget.”*

Three wealthy towns, but only one has a corporate base attached.

All three towns can support an affluent specialty shop. What separates them is not whether the customer is rich — all three are — but whether the town generates the corporate gifting demand that carries a small store through its slow quarters. On that single axis, Southlake stands apart.

THE NUMBERS SIDE BY SIDE

	SOUTHLAKE	KELLER	TROPHY CLUB
Population	~31,100	~46,300	~13,700
Median household income	\$250,000+	\$174,950	\$201,054
Per capita income	\$116,135	\$79,329	\$87,133
Bachelor's degree or higher	74.6%	60.6%	67.6%
Median home value	\$1,014,500	\$594,300	\$675,100
Households	~9,229	~16,462	~4,757
Small-shop retail rent (base, NNN)	\$30-\$60/SF	\$22-\$45/SF	\$22.50-\$28/SF

Sources: U.S. Census Bureau QuickFacts for each town (Southlake, Keller, Trophy Club), read September 16, 2026. Rents from live broker listings and market reports (LoopNet, PropertyShark, CityFeet, and a Trinity Advisors broker guide), same date. Where a figure is a range or carries a data caveat, both ends are shown.

A NOTE ON SOUTHLAKE'S INCOME

Census QuickFacts caps the reported median at “\$250,000+” and reports per-capita income of \$116,135; a JLL sale memo for the Sabre HQ submarket cites an average household income near \$270,000. The honest read: Southlake's median household income is at or above \$250,000 — the highest of the three by a wide margin, and among the highest of any U.S. city its size. On the ACS “richest cities” ranking for populations over 20,000, Southlake placed first and Keller forty-fifth.



WHY SOUTHLAKE IS DIFFERENT

The single most important market fact in this plan.

Sabre Corporation is headquartered in Southlake — a five-story, roughly 266,000-square-foot campus at 3150 Sabre Drive, with about 4,650 employees and \$2.77 billion in 2025 revenue. Southlake sits in the Westlake and Grapevine office submarket, which JLL describes as carrying an average household income near \$270,000 and bachelor's attainment above sixty-seven percent, adjacent to DFW International Airport. This is a corridor thick with corporate offices and executives — the exact customer base that buys corporate client-appreciation gifting and executive holiday baskets in volume.

A specialty-food shelf sells to individuals one jar at a time. A corporate-gifting program sells to a company's office manager fifty baskets at once, on a date, every December — and Southlake is where those offices are. Keller and Trophy Club are wealthy *residential* towns. Southlake is a wealthy residential town *with a corporate base attached*. That corporate base is the fuel for the highest-margin, fastest-turning, most season-carrying channel in the whole model.

~4,650

Sabre employees at the Southlake headquarters

~\$270k

Average household income, Westlake/Grapevine office submarket (JLL)

96.4%

Southlake retail occupancy — space is scarce and commands rent (Select Southlake)

The recommendation, and its two alternatives.

RECOMMENDED

Southlake

The wealthiest customer of the three, the corporate-gifting demand a headquarters town uniquely generates, and a tight, premium retail market where space is scarce. The trade-off is cost: premium small-shop rent runs thirty to sixty dollars per square foot NNN, the highest of the three, and Southlake Town Square is a managed premium environment. You pay the most here, and you get the most — because the corporate channel only exists here. Model it at a premium rent point; the address is not an indulgence, it is the revenue thesis.

THE VALUE PLAY

Trophy Club

Very affluent at just over two hundred thousand dollars median, with the lowest rent of the three — but the smallest market, roughly thirteen thousand seven hundred people and under five thousand households, and the least retail infrastructure. A jewel-box here would be a neighborhood destination for a wealthy but small catchment, with little corporate demand and limited drive-by traffic. Lowest cost, lowest ceiling.

THE DISCIPLINED ALTERNATIVE

Keller

A larger population near forty-six thousand, still firmly affluent at a hundred-seventy-five-thousand-dollar median, and a materially lower rent with real one-thousand-to-twenty-five-hundred-square-foot listings. Keller is the right answer if the priority is protecting the budget and building a strong *residential* gifting-and-retail business without leaning on corporate volume. Less corporate demand, more everyday walk-in from a bigger, younger household base. The safe play.

THE RECOMMENDATION

Southlake, if the corporate-gifting program is built in earnest from day one. The premium rent is justified only if the corporate channel is worked hard. Otherwise the same jewel-box earns more per dollar of rent in Keller.

So the town and the go-to-market are one decision. Choose Southlake and commit to corporate gifting, or choose Keller and run a leaner residential model. Trophy Club is the fallback if a specific, well-priced second-generation space appears there.

Thirteen hundred square feet, split three ways — the workroom carved out, not added on.

The jewel-box logic is that the gifting workroom lives inside the same footprint, not beside it. No extra square footage, no restaurant kitchen — a layout decision, not a cost. The wrapping bench sits out on the retail floor on purpose, because watching a gift being built is theater that sells the service; the workroom behind it stages the volume corporate orders out of the customer's sightline.

THE FOOTPRINT, OF 1,300 SQUARE FEET

ZONE	SHARE	SQ FT	WHAT IT HOLDS
Retail floor	~60%	~780	Shelving walls, refrigerated cases, a central table display, the counter and POS, a wrapping bench visible to customers
Gifting workroom	~25%	~325	Basket-build stations, packing materials, ribbon and wrap stock, a work surface — the production heart
Storage & back-of-house	~15%	~195	Dry inventory, a small office nook, staff area, receiving

Staffing

The operator — the friend — works full-time: the floor, the buying, the gifting production, the corporate relationships. A modest salary plus equity, detailed later in this plan.

One to two part-time associates at roughly fifteen dollars an hour (the verified North Texas range is fourteen to eighteen). One in the slow season, scaling to two or three seasonal hands for the November and December corporate surge — the weeks when the store makes its year.

Hours

Specialty-retail hours in the base case — roughly Tuesday to Saturday ten to seven, Sunday eleven to five, closed Monday — with extended December hours.

WHY NO COMMERCIAL KITCHEN

A packaged and prep-and-pack gourmet store — assembling baskets and wrapping, no cooking — triggers far lighter health-plan review and buildout than a food-service kitchen with a Type I hood and grease trap.

That distinction is worth roughly **\$150,000 to \$300,000 in avoided buildout** and is the reason the concept fits the budget. The store sells packaged and shelf-stable goods and builds gifts from them; it does not cook.

A QUIET EFFICIENCY

Corporate work happens partly outside retail hours — built and shipped mornings and evenings — so the same rent is worked more hours per day.

This is where the store makes its money.

The retail floor proves the store is serious and feeds walk-in. The gifting operation is the margin. It carries higher gross margins than retail grocery, it turns faster, and its corporate channel sells in volume on a date — which is precisely what carries a small store through the quarters when the floor is quiet.

50–70%

Gross margin on gift baskets

70–85%

Gross margin on wrapping services

Faster

Turn than shelf stock — built to order, out in days

Four tiers, one shelf.

Every basket is built from the same curated shelf, at a blended gross margin near sixty percent. The tiers are a ladder of occasion and budget, from a hostess thank-you to a bespoke corporate commission.

TIER	RETAIL PRICE	WHAT'S IN IT	GROSS MARGIN
The Everyday	\$45-\$65	A thank-you or hostess basket: oil or vinegar, crackers, a chocolate bar, a small preserve, wrapped	~55%
The Signature	\$85-\$150	The core gift: a curated six-to-eight-item international selection, premium presentation	55-65%
The Executive	\$175-\$350	Premium and corporate: top-shelf oils, aged balsamic, fine chocolate, tinned seafood, a luxury box	55-65%
The Bespoke	\$350+	Custom corporate or wedding-scale, built to a client brief, branded	55-65%

A SIGNATURE BASKET, UNPACKED

A roughly \$120 sale.
Less ~\$45 in goods cost, for ~\$75 gross.
Less ~\$20-\$30 in labor, materials, and overhead.
Net ~\$25-\$35 per basket. Sell fifteen Signature baskets in a single corporate order and that one order nets more than a strong retail day.

The wrapping service

A standalone, near-pure-margin service: bring in a bottle or a purchase, and it leaves as a gift — luxury paper, ribbon, hand-tied, a card. Eight to thirty-five dollars per wrap depending on scale, at seventy to eighty-five percent margin. Low materials cost, high perceived value, and it converts a thirty-dollar retail purchase into a fifty-dollar transaction.

It also trains customers to think of the store as *the gifting place*, which drives basket and corporate business in turn. The margins beat retail because the sell is craft and time, not goods — and craft is what the store is built to sell.

The corporate program is the difference between a nice shop and a profitable business.

Corporate gifting is the fastest-growing segment of the gift-basket market — well over a third of it, growing at roughly seven percent a year. It is sold operator-to-office-manager, relationship by relationship, which is precisely the work an owner-operator with equity in the outcome does well. One recurring corporate account can be worth more than a month of retail walk-in.

Southlake's corporate base — Sabre and the Westlake and Grapevine office corridor — is exactly this customer. The channel has four shapes, and each is a different reason a company writes the store a check.



The wrapping bench. Craft and time, not goods — the highest-margin work in the store, and the thing that makes it the town's gifting place.

Client appreciation

Companies sending baskets to their clients at holidays, closings, and thank-yous. Volume orders on a date.

Employee gifting

Staff appreciation, onboarding, and milestone gifts — steady, repeatable, un-seasonal demand.

Recurring accounts

A law firm, a realtor, a wealth-management office that gifts every quarter. Revenue in every month.

Branded & custom

The company's own ribbon, card, or a co-branded box — the bespoke tier at corporate scale.

THE SEASONAL SHAPE, NAMED HONESTLY

This business earns unevenly. November and December — the corporate and holiday surge — likely carry a third of the year. That concentration is both a risk and a feature: a weak December hurts, but a strong one can carry the store through its quiet months, and the store can run lean the rest of the year. The corporate channel, pre-sold in the fall for December delivery, is what pulls the slow quarters over the line. The cash plan on the following pages funds the pre-holiday inventory build so the busiest season is never a solvency question.

Can it be built for \$200,000? Yes — with a negotiated allowance, and levers if it slips.

Here is where the startup money goes, in the base case: a thirteen-hundred-square-foot store at a Southlake premium address with a full ninety-five-dollar-per-square-foot buildout. This is the honest, higher-cost version. The lever that brings it inside the ceiling is the landlord's tenant-improvement allowance, and the alternatives are a lighter-refresh space or a lower-rent town.

STARTUP BUDGET — SOUTHLAKE PREMIUM CASE

LINE	AMOUNT
Buildout, hard cost (2nd-gen, \$95/SF)	\$123,500
Soft cost & contingency (15%)	\$18,525
Fixtures & equipment	\$30,000
Opening inventory	\$35,000
Permitting, licensing, insurance, legal	\$4,500
Opening marketing & launch	\$8,000
Gross startup total	\$219,525
Less: TI allowance (\$20/SF negotiated)	-\$26,000
Net startup cost	\$193,525

Buildout at \$95/SF (light refresh runs \$50–\$90, moderate \$90–\$130); TI allowance range \$15–\$35/SF. Figures traceable to the live financial model, September 2026.

+\$6,475

Headroom under the \$200,000 ceiling, net of the allowance

THE HONEST READ

At the Southlake premium address with a full buildout, this runs right at or slightly over the ceiling *before* an allowance — about \$19,500 over. It lands inside the ceiling *with* a negotiated allowance. The point is not that \$200,000 is tight; it is that **\$200,000 is enough with the levers, and not enough without them.**

THE LEAN ALTERNATIVE

A Keller or lighter-refresh path — buildout at \$65/SF, a \$25/SF allowance — lands near **\$142,175** net, roughly \$57,000 of headroom. Same store, more breathing room.

THREE LEVERS YOU HOLD

A better-conditioned space

A second-generation space needing a light refresh (\$50–\$90/SF), not a moderate finish-out, saves \$30,000 to \$60,000.

The allowance, negotiated

The TI allowance is real money on the table — fifteen to thirty-five dollars a foot. Do not leave it unclaimed.

A lower-rent town

Keller or Trophy Club, where rent is lower and the same budget breathes. The trade is corporate demand.

What each thing the store sells actually earns.

PER-TRANSACTION ECONOMICS

LINE ITEM	PRICE	MARGIN	NET
Retail item (avg)	\$38	49%	\$19
Wrapping service	\$22	78%	\$14
Everyday basket	\$55	60%	\$21
Signature basket	\$120	60%	\$47
Executive basket	\$260	60%	\$116
Bespoke basket	\$450	60%	\$200

Net is gross margin less allocated labor, materials, and overhead per unit. Retail margin 49% (range 40–60%); basket blended 60% (range 50–70%); wrapping 78% (range 70–85%+). From the live financial model, September 2026.

“Higher margin and faster turn is the whole thesis.”

The table reads top to bottom as the reason the store is gifting-led. A retail item nets nineteen dollars and sits on the shelf for weeks. A Signature basket nets forty-seven and is out the door in days. An Executive basket nets one hundred sixteen. The shelf earns slowly and evenly; the baskets earn faster and in bursts. The store's job is to move a customer up that table — from a jar to a wrap to a basket to a standing corporate account.

Break-even — the success test made numeric

The monthly fixed cost, with the operator's fifty-five-thousand-dollar salary included as a line paid every month, is **\$14,856**. At a blended gross margin of fifty-seven percent, the store breaks even at **\$26,041 in monthly sales**. The mature run-rate is twenty-eight thousand a month — a cushion of just under two thousand dollars. A normal mature month clears the nut.

\$14,856

Monthly fixed cost, operator salary included

\$26,041

Break-even monthly revenue

+\$1,959

Margin of safety at the \$28,000 run-rate

THE HONEST CAVEAT

This is a lean business with a thin margin of safety in a normal month, and it depends on the gifting engine performing. Peak December (\$32,130) clears comfortably; the slowest month, January (\$10,395), does not. The corporate channel is what pulls the slow months up — which is why the plan and the town choice are one decision.

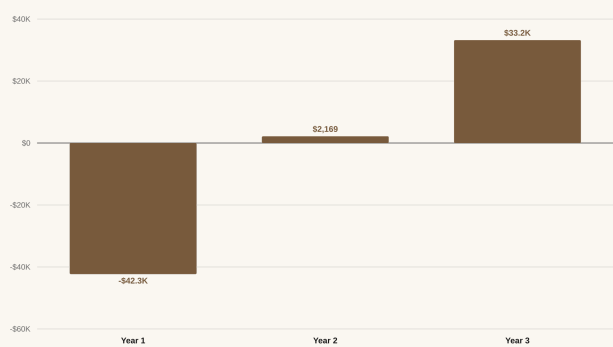
A new store bleeds in year one, crosses over in year two, and yields fairly by year three.

PROFIT & LOSS, YEARS ONE TO THREE

	YEAR 1	YEAR 2	YEAR 3
Revenue	\$252,000	\$340,200	\$401,436
Operator salary	\$55,000	\$55,000	\$55,000
Rent & NNN	\$61,100	\$61,100	\$61,100
Operating income	- \$42,304	+\$2,169	+\$33,207
Operating margin	-16.8%	+0.6%	+8.3%

Year-1 ramp factor 0.75; Year-2 growth +35%; Year-3 growth +18%. The operator's salary is a fixed line, paid in full every year including the loss-making first. From the live financial model, September 2026.

Operating income, Years 1 to 3



Operating income, Years 1 to 3. The first-year loss is planned and funded; the line crosses zero in Year 2 and reaches a fair 8.3% margin by Year 3.

THE TWO CONDITIONS, STATED PLAINLY

The operator's living is covered from day one — her salary is paid every month of every year. Her living does not wait for profitability.

The business itself turns cash-positive in Year 2. Year 1 is a planned loss, funded by the separate operating pool. That is exactly why the pool exists.

“The operator draws her living wage every year. The business turns cash-positive in Year Two.”

The store earns in bursts — so the cash plan funds the valley, not the average.

Monthly revenue against the break-even line



Monthly revenue against break-even (\$26,041/mo). Only the fall and the corporate-and-holiday surge of November and December clear the line comfortably; the slow months run below it — the true shape of the business, not a flat monthly average.

-\$81,180

Deepest Year-1 cash valley, bottoming in November as the pre-holiday inventory is built

~\$130–150k

Recommended operating pool — 12 to 18 months of runway

TWO POOLS, KEPT SEPARATE

Pool one — the \$200,000 builds the store. **Pool two — the \$130–150k** keeps it alive through the first year's planned loss and the seasonal valley. Confusing the two is how a well-conceived store runs out of money the month before its best season.

The operating cash is a separate pool, on top of the \$200,000.

This is the plan's single most important structural decision. The store earns in the fourth quarter but pays rent and staff all year, and it must buy the holiday inventory *before* it sells the holiday baskets. The model's deepest cumulative cash valley in the first year reaches roughly eighty-one thousand dollars, bottoming in November.

So the operating cash is held as its own pool — the valley plus a buffer of about three months of fixed cost — rounded to a hundred thirty to a hundred fifty thousand dollars, twelve to eighteen months of runway. With it, the busiest season is never a solvency question. Pre-selling the December corporate orders in October pulls cash forward and eases the valley further.

Three plain truths to hold, because a partner proud of his numbers names the risks too.

01

Gifting is seasonal and lumpy.

The corporate and holiday surge likely carries a third to nearly half of the year. That concentration can carry a whole year, and a weak December hurts. **The work:** build year-round demand deliberately — not just Christmas, but the full calendar of gifting occasions: Valentine's, Mother's and Father's Day, graduations, weddings, corporate onboarding, quarterly client-appreciation, sympathy and congratulations. A store that only earns in December is fragile; a store that manufactures gifting occasions across twelve months is a business.

03

The bar is a living, not an empire.

You asked for enough positive cash flow to pay your friend a living and justify your capital — a modest target, and an achievable one for a lean gifting-driven jewel-box. Held as what it is: this is a good small business that can pay one person a living and return a fair yield on two hundred thousand dollars, not a high-growth venture. Against “can it make my friend a living?” the answer is a reasonable yes. The plan is sized to the bar you actually set.

02

The business lives in the operator.

The curation, the relationships, the craft of a well-built basket, the corporate accounts — these live in her, not in the brand or the shelf. Her equity stake is a genuine strength: it aligns her to build, not just run. But the value is one-person-concentrated; if she steps back or leaves, much of it walks with her. **The work:** the structure on the following pages protects against this with vesting and clear terms, and over time she documents the buying relationships and trains a second pair of hands.

WHERE THE NUMBERS PUSH BACK

The \$200,000 ceiling is genuinely tight at the Southlake premium address — it fits only with a negotiated allowance. Keller or a lighter-refresh space is the release valve.

Break-even (\$26,041) sits just below the mature run-rate (\$28,000) — a roughly \$2,000 monthly cushion. A modest-success plan, not a comfortable one.

The operator salary is the most sensitive lever: at \$65,000, break-even climbs to \$27,502 and the cushion nearly vanishes; at \$45,000 it drops to \$24,580. That trade is yours and the operator's to set — the model makes it explicit.

The cheapest marketing this store can do is also its most profitable.

For most retail, marketing is how you get people through the door. For this store, the highest-leverage marketing is a sales channel — and it costs almost nothing. The gifting engine is sold operator-to-office-manager, relationship by relationship: a realtor who does closing gifts, a Sabre office manager who ships client baskets in December, a wealth-management office that gifts quarterly. Those relationships are built by a person walking in and shaking a hand, not by buying ads.

So the promotion plan and the revenue plan are the same plan. A jewel-box gourmet store in these towns does not need a large paid-media budget. It needs three things: to be *seen being born* on free local channels, a real opening that affluent locals want to attend and post about, and a deliberate, repeatable corporate-and-realtor outreach engine that runs all twelve months. Everything below serves those three, and the single most expensive tactic in the whole plan is a chamber membership under five hundred dollars.

THE ONE WEEK THAT MATTERS MOST

The week the lease signs:

- 1 Lock the name; reserve the domain and the social handles.
- 2 Stand up a one-page landing site with an email-capture field. Start collecting emails immediately.
- 3 Post the first “we’re building something” story to Instagram and the local community groups.
- 4 Print a simple rate card, build two sample baskets, and start walking into realtor offices and calling corporate office managers.

None costs more than a few hundred dollars, and together they are worth more than any ad budget this store could buy.

PHASE 1 · PRE-LAUNCH

Lock a simple brand identity; stand up the one-page site and social pages. **Build in public** — the buildout is free, compelling content. Begin the corporate-and-realtor outreach so the store opens with day-one orders booked.

~\$400–\$900 one-time.

PHASE 2 · OPENING

A soft-open tasting evening, a public grand-opening weekend, and a chamber ribbon-cutting. Pitch it as a *story* to the local lifestyle press, and seed a few local micro-influencers with a basket rather than paying them.

~\$2,200–\$5,100, inside the launch line.

PHASE 3 · YEAR-ROUND

Own an email and SMS list from day one — the most valuable free asset, and how the store fights the slow-season lull. Keep the outreach systematic and the free channels alive.

~\$500–\$1,400/yr ongoing.

A calendar built to sell the biggest season in advance.

Time the opening to land before the fourth quarter where possible — a late-summer or early-fall opening puts the store in front of its biggest season within its first months. The through-line: manufacture gifting occasions across all twelve months, and sell the highest-revenue season in advance rather than chasing it.

FIRST-YEAR MARKETING CALENDAR

PERIOD	MARKETING FOCUS	COST REGISTER
Pre-lease → signing	Lock name and brand identity; reserve social handles and domain	~\$400–\$900 one-time
Buildout months	Build-in-public content series; local groups and Nextdoor; landing page and email capture; begin realtor and corporate outreach	\$0–\$50/mo + time
Opening month	Tasting event and grand-opening weekend; chamber ribbon-cutting; earned-press pitches; micro-influencer seeding	~\$2,200–\$5,100*
Nov–Dec (the year)	Holiday corporate run, sold Sep–Oct; holiday basket campaign to the list; heaviest walk-in; a boosted holiday post	~\$150–\$400
Jan–Feb	Fight the post-holiday lull: Valentine's campaign to the list; new-arrival storytelling; keep realtor closings flowing	~\$50–\$150
Mar–May	Mother's Day, graduations, weddings, teacher and end-of-year gifting; email and social occasion pushes	~\$100–\$250
Jun–Aug	Slowest stretch — lean on year-round realtor closings and corporate onboarding; Father's Day; plan the Q4 outreach	~\$50–\$150
Sep–Oct	Sell the holiday season now — corporate outreach in earnest; anniversary and re-engagement email; build the December order book	~\$50–\$200

*The opening spend is already carried inside the startup allocation's \$5,000–\$10,000 launch line — it does not add to the \$200,000 ceiling.

The annual marketing budget

One-time pre-launch & opening	~\$5,000–\$10,000
Ongoing annual (P&L line)	~\$8,000–\$14,000/yr

The one-time figure sits inside the startup allocation. The ongoing line is roughly \$650–\$1,150 a month blended.

THE HONEST READ ON THE NUMBER

A lean, gifting-led store does not need a large ongoing budget: its highest-value marketing, the corporate and realtor outreach, costs the operator's time, not media dollars. Eight to fourteen thousand a year is realistic and modest. Paid local media later is a choice to spend more, not a requirement — model it as upside.

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A genuine partnership, with a genuine governance question — answered honestly for both sides.

You fund and own the capital; a long-time friend operates the store for a modest salary plus equity. That is a real partnership, and it deserves a real structure. You need return on capital and downside protection. She needs a store she can run and earn from, and confidence that her sweat builds real ownership. A good structure serves both, and it is far easier to agree while the friendship is strong and the optimism is high than after there is money on the table and stress in the room.

THE PEN STOPS AT THE LICENSE

What follows is the *thinking* — the structure a good operating agreement addresses, and the logic behind each choice.

The operating agreement itself is drafted by your attorney. This plan prepares you to have an informed conversation with counsel. It is not, and does not replace, that legal document. That is stated once, here, plainly — and it holds for every point on the next page.

Equity split — capital versus labor

You provide the capital and carry the risk; the friend provides the full-time operating labor. A common shape: the investor holds the majority, because he funded it and bears the loss if it fails, and the operator earns a meaningful minority stake that reflects her sweat and grows over time. Money bought the store; work builds its value.

Salary versus equity — both matter

The salary is her livelihood — it must be enough to live on, paid from operations. The equity is her upside — the reason to build the business, not just run it. Too little salary and she cannot afford to stay; too little equity and she has no reason to fight for the corporate accounts that make the difference. Both belong in the model as explicit, adjustable lines.

The provisions people skip — and regret.

Vesting

The operator's equity should vest over time — a multi-year vest, often with a one-year cliff — so ownership is earned by staying and building, not granted on day one. This protects you if the partnership ends early and rewards the friend for the long build. It is also the honest answer to the operator-concentration risk: because so much of the business's value lives in her, the terms that govern her staying, leaving, and being valued are not paperwork. They are the business's continuity plan.

Buy and sell provisions

What happens if one party wants out? The agreement should define how a stake is valued and bought back, so neither party is trapped and neither can be forced out unfairly. This is the provision people skip while everyone is optimistic and regret when circumstances change. Settle the method for valuing a stake now, in calm, rather than negotiating it later in conflict.

Roles and decision rights

Who decides on major spend, on taking a big corporate contract, on hiring? A clean split — the operator runs daily operations and merchandising; major capital and strategic decisions are joint or investor-led — prevents the friction that sinks partnerships between friends. Write it down before the first disagreement, not during it.

What happens if it fails

The hardest and most important conversation, best had while everyone is optimistic. Who bears the loss — your capital is at risk by design — how the business is wound down, how remaining inventory and assets are handled, and, because these are long-time friends, how the *relationship* is protected from the business's failure. Naming this now is not pessimism; it is the kindness that keeps a friendship intact if the store does not make it.

*“Structure the partnership **now**, in writing, through counsel, while the friendship is strong and the optimism is high. The studio has prepared the thinking; your attorney writes the document.”*

On the honesty of these numbers

This document was built to be trusted, so it should also tell you where its trust runs out. Every load-bearing figure inside it — the demographics of the three towns, the corporate base at Sabre, the rents, the buildout costs, the margins on a basket — is either verified against a live source dated September 16, 2026, or written as an honest range with its basis named. Where a single figure could not be pinned, the range carries both ends rather than a false point.

Three kinds of number move with time, and each should be re-checked before you commit real money against it. **Rents** move with the market and with the specific address; the figure that matters is the one on the lease in front of you, not the corridor average here. **Buildout cost** is the single line most likely to break the budget, and the only version worth trusting is a hard bid from a real contractor on a real space. **Demographic and corporate figures** are current as of this writing and will drift; re-read them the season you act.

The plan itself is sound at the register it was built for: a modest, gifting-led jewel-box that can pay one operator a living and return a fair yield on the capital. It is not a promise, because no plan is. It is a well-reasoned, well-sourced starting position — the thinking done carefully, so the conversations that follow can be sharp.

BEFORE YOU SIGN A LEASE

Get a hard contractor bid on the actual space.

Re-verify the rent, the TI allowance, and the term with the landlord.

Re-confirm permitting scope with the county health department for a prep-and-pack (no-cook) format.

Have counsel draft the operating agreement before capital moves.

BASIS OF THIS DOCUMENT

All figures in USD.

Market: North Texas (DFW), the towns of Southlake, Keller, and Trophy Club.

Prepared September 16, 2026.

The market read is grounded. The store concept is a real operator's plan. The feasibility verdict is honest on both sides. Read it, argue with it, and carry the parts that survive the argument into the room where the decisions get made.