



INVESTREADY

2019 Partner Information Sheet

Who is InvestReady

Since 2013, InvestReady has been the market leader for accredited investor verifications, leveraging Financial Technology to offer a completely digital and seamless verification experience while driving down costs to offer an unbeatable price.

- More than five years of operating history in this industry
- Thousands of verifications performed for world-class platforms
- Dozens of happy partners who know that investors have the best experience



Mercedes-Benz Financial Services





Our Product Today

- Electronic IRS Verification
- Tax Document Upload
- Asset Document Upload
- TransUnion Automatic Credit Report Pull
- Automated 3rd Party Letter
- Trust/Entity Verifications
- Works for International Investors
- Mobile Optimized for any Device
- Auto-renewal Capabilities
- Issuer Dashboard to track users' verification stage and certificates
- Background Checks on 3rd Party
- SEC compliant digital certificates

Your Legal Information

State ▼

Fill in your info to continue

Verify your info

Your Legal Name

John Doe

Your Legal Address

1101 Brickell Ave
Miami, Florida
33131

Your e-mail

john@gmail.com

Something is wrong? [Edit](#)

Continue



Do you have verifiable assets of at least \$1MM excluding your primary residence?

No

Yes

Custom Feature Cards

Request Verification

Authorization to request your
2015 & 2014 IRS Transcripts

Select the tax form type for your transcript request.*

W2

*Please only select the 1040, 1040A or 1040EZ option if you have filed your 2015 taxes at least two (2) weeks prior to today.

*Please only select the W2 option if your 2015 W2 or 1099 was provided to the IRS at least six (6) weeks prior to today.

Most recent return year filed with the IRS

2016

How did you file your most recent return?

Filed Individually

Continue

Please add your first asset.
Which one of these would
you like to add?

Bank Account

Property

Car

Crypto Asset

Liabilities

Add Property

Address

7732 SW 98Ave

Address

City

Miami

State

FL

Zip code

33131

Property Value \$

\$540,000

Mortgage Outstanding \$

\$2,220

Net Value

\$537,780

Value in Zillow

\$553,345



Add

Pricing & Payments

We provide three options for paying for the verification service:

- **Partner pays per verification** - Partners attach and authorize a credit card onto their profile and pay the per verification fee once an investor submits a verification request through their integration. The current pricing for this method is **\$34.90** per standard verification.
- **Partner Pre-pays for verification credits** - Partners also have the option to pre-purchase verification credits at a discount (see next slide for pricing). One credit per standard verification.
- **Investor Pays** - Finally, we provide the option to include a paywall if you would prefer your investors pay for the verifications themselves. The pricing is also **\$34.90** per standard verification.

2019 Bulk Pricing

Our bulk pricing allows partners anticipating larger or on-going demand to save on their per verification costs by pre-purchasing packages of credits. Simply let us know how many you would like and we'll add them to your account and send you an invoice.

Number of verifications	Price per 506(c) verification
1 to 24	\$34.90
25 to 99	\$29.90
100 to 999	\$27.90
1,000 to 2,499	\$24.90
2,500+	\$19.90

Integration Types

Hosted Landing Page

Easiest

No Technical Integration required. We host a page on InvestReady for you to use.

On-site Integration

Most Popular

Integrate our services into your website seamlessly using our iFrame method.

Advanced API Integration

Custom

Build your own front-end experience using our backend functionality.



Coming soon in 2019

- **InvestReady Network**
- **New Services**
 - InvestReady Global
 - InvestReady *Express*
 - Crypto Wallet Verification



INVESTREADY
NETWORK

**Network
Details**



The InvestReady Network allows currently accredited users on our system to easily authorize their InvestReady verification on participating partners' platforms. Partners are able to reach these valuable users for free and also receive benefits such as verification discounts. We are also providing participating partners with the opportunity to sponsor our new newsletters, giving them even greater visibility to our growing network of accredited investors.



Phase 1

Quarterly Newsletter

Provides relevant content and links to our partners.

Available sponsorship opportunities. Launching Q1 2019.



Phase 2

Website Section

Allows already verified users to quickly share their verification with participating partners. Launching Q2 2019.

Investors

- Must **Opt In** to participate (will not be contacted or shown the section without consent)
- Users in the network will be sent our quarterly email and will have access to the website section once it is available.
- Will have the ability to instantly authorize portals they are interested in to access their accredited status.

Partners

- May **Opt Out** of participating in the network (default option will be in-network)
- Will have the opportunity to provide content for our newsletter and site, and get exposure to currently verified and accredited investors.
- Participating partners will receive discounts and sponsorship opportunities.

1) What are the benefits to participating in the network?

By participating in the network, partners will have free exposure for their offering to already approved investors. We will also be providing participants discounts on new verifications as well as discounts on investors joining your platform that came from the network. Finally, we will providing the opportunity for partners to sponsor the newsletter, providing even more exposure.

2) If a partner opts out, what happens?

If opted out, none of the investors that are **solely** synced with your platform will be contacted to opt-in to the network and will not be sent the newsletter. Additionally, when the section for the network is launched on our website, it will be hidden from those investors. The down side is your link and content will not appear on the quarterly newsletter and you will not be eligible for any discounts or benefits associated with the network.

3) Is InvestReady selling the data of the investors that are receiving the newsletter?

No. We are emailing them ourselves and will not be sharing the emails or any personal information with anyone. The investor has a choice as to whether they want to connect with participating partners' offerings. At no point will any partner or other party get access to the list of investors in the network. The only "ads" on the newsletter or network section will be provided by partners that have integrated our API.

4) Will investors be able to opt in, and then opt out if they choose to after the initial opt in?

Yes, they'll be able to opt out of the newsletter by unsubscribing to it (it's going to be a separate account than our support emails so those emails won't be affected) and once it's available on the site, they'll be able to turn it off at any time.

5) What is the pricing for the newsletter sponsorship?

We're planning on basing the sponsorship pricing on the number of investors on the final list and charging a price per person contacted. We want to make it reasonable so we are waiting to see how many participants we have before zeroing in on a specific number.



INVESTREADY
GLOBAL



INVESTREADY
EXPRESS



INVESTREADY
CRYPTO

**New
Services**



International verifications under local laws and regulations in 55+ countries, including **Singapore, Hong Kong, The UK, Switzerland, and the European Union.** Launching Q4 2018.



Instant verifications for both US income and net worth accredited investor verifications. Launching Q1 2019.



Verification of ownership and value of crypto wallets to use towards net worth and asset verifications. Launching Q2 2019.

Contact Information

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www.investready.com

InvestReady

800-208-5819

Miami • Los Angeles

Thank you!



I N V E S T R E A D Y

Please let us know if you have any questions or concerns about the announcements and we'll be happy to assist.