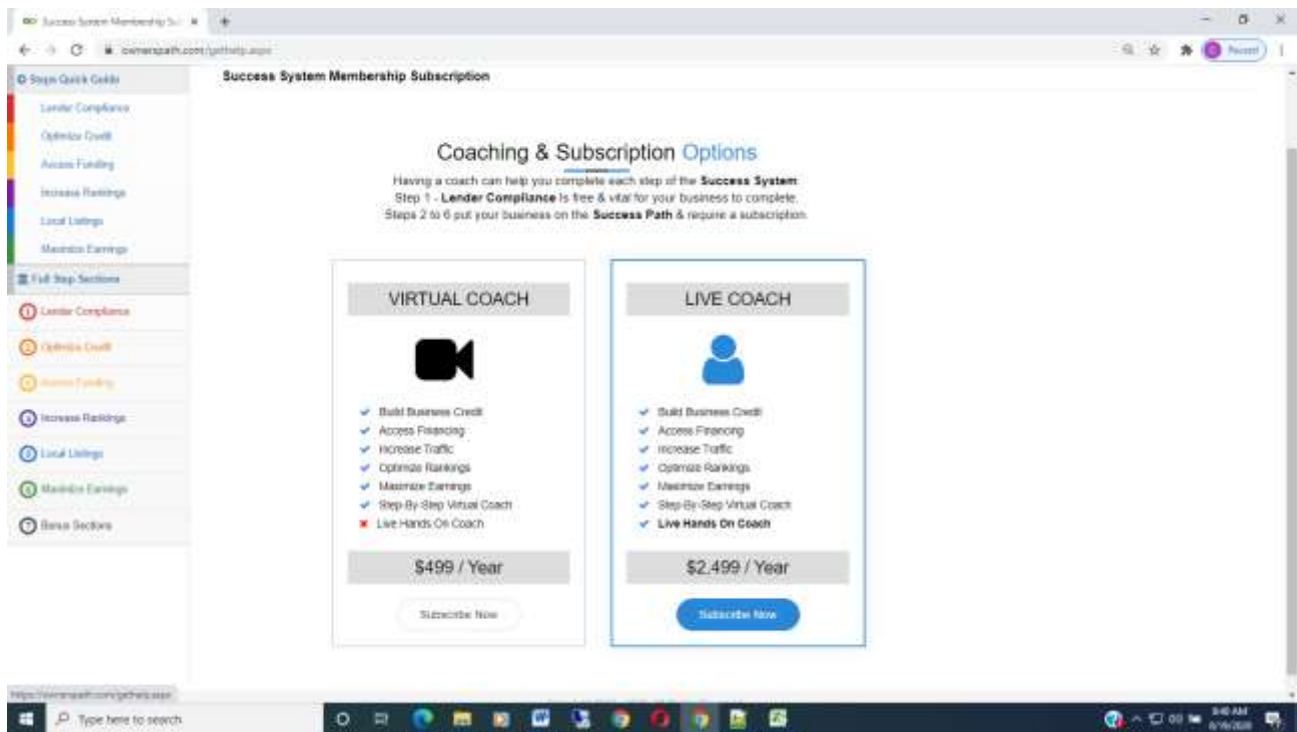


## Private Label Setup Completion

1. **Member Subscription Payments** – As a private Label you will be setting your own pricing for both the Virtual and Live Coached success system memberships. Any non-paid member of your system will be able to complete Step 1 – Lender Compliance and will be locked out of Steps 2 through 7. When a non-paid member attempts to access these other Steps they will see this membership subscription page:



The amounts shown above are placeholders only. You can charge whatever and however you want for either membership subscription type. Your price for the Virtual coached license is \$150 and your cost for the Live coached license is \$700. Licenses are billed to you via invoice and on file e-check on the 1<sup>st</sup> and 15<sup>th</sup> of each month for the license you had sold in the weeks prior to those dates.

Please indicate where you wish your member payment links to go to for you to be able to collect your license payments. These can be landing pages that you have created or direct merchant processing pages where you will be accepting payments directly from your members.

Virtual Coach Payment URL: \_\_\_\_\_

Your Virtual Coach Selling Price: \_\_\_\_\_

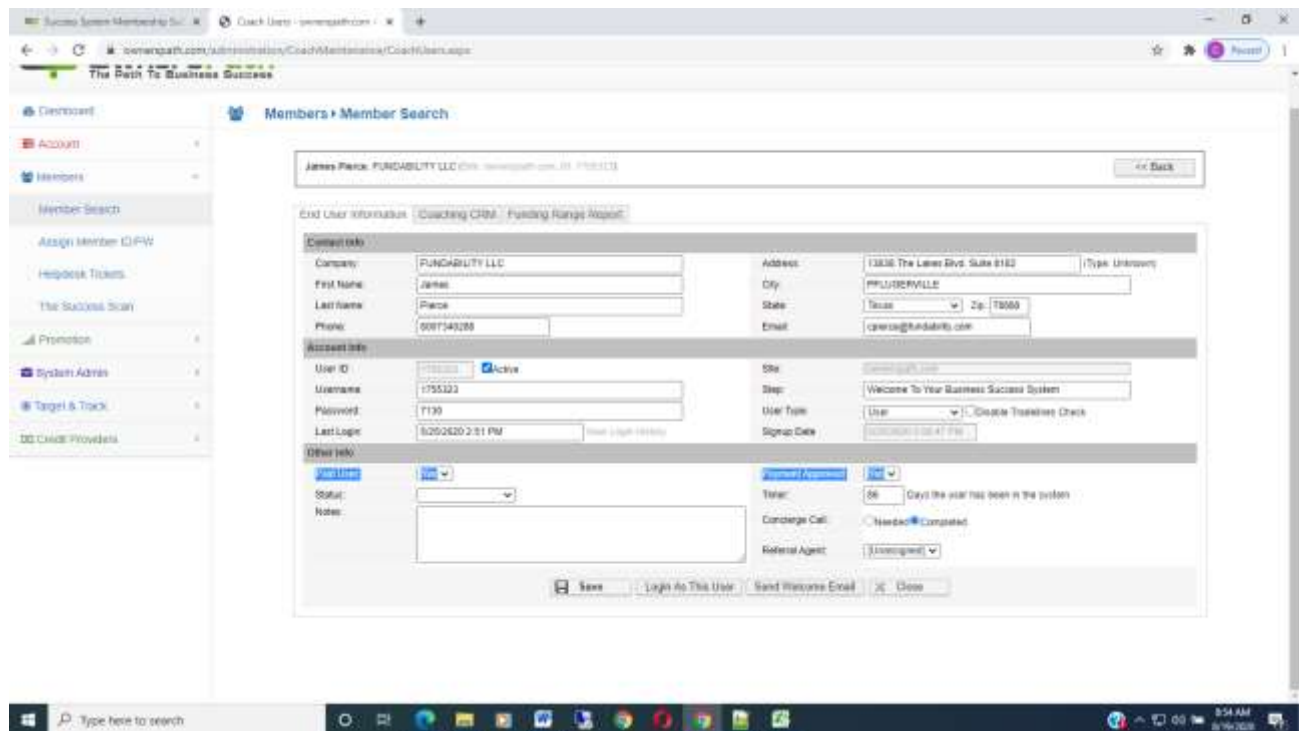
Live Coach Payment URL: \_\_\_\_\_

Your Live Coach Selling Price: \_\_\_\_\_

## Private Label Setup Completion

2. **Member Payment Activation** – Once a member has paid for a subscription you will need to activate their subscription. You do this by going to the Member Search area inside your administration portal. Here you will indicate that the member is now a paid subscriber and that you have successfully collected their payment:

Please note that there are two payment indicators that both need to be set to “Yes” for your members to be able to access all areas of your back office success system and from them not to receive the membership subscription payment required notifications.



The screenshot shows the 'Members > Member Search' page in the OwnersPath administration portal. The user profile for James Pearce, FUNDABILITY LLC is displayed. The page is divided into several sections:

- Contact Info:**
  - Company: FUNDABILITY LLC
  - First Name: James
  - Last Name: Pearce
  - Phone: 0087349288
  - Address: 13336 The Lakes Blvd, Suite 9132 (Type Unknown)
  - City: MILFORDVILLE
  - State: Texas
  - Zip: 75060
  - Email: james@fundability.com
- Account Info:**
  - User ID: 1755123 (Active)
  - Username: 1755123
  - Password: 7130
  - Last Login: 8/25/2020 2:51 PM
  - Site: ownerspath.com
  - Step: Welcome To Your Business Success System
  - User Type: User
  - Signup Date: 8/25/2020 2:54:47 PM
- Other Info:**
  - Account Agreement: Yes
  - Year: 06 (Days the user has been in the system)
  - Concierge Call:  Needed  Completed
  - Referral Agent: (Unassigned)

At the bottom of the form, there are buttons for 'Save', 'Login As This User', 'Send Welcome Email', and 'Close'.

## Private Label Setup Completion

3. **Private Label Contact Info** – Inside your Administration area is the Private Label Settings page.

This page needs to be completed and will control what your Members see for their system support and what notifications you receive for their actions or needs. Make sure you complete this section before adding new members:

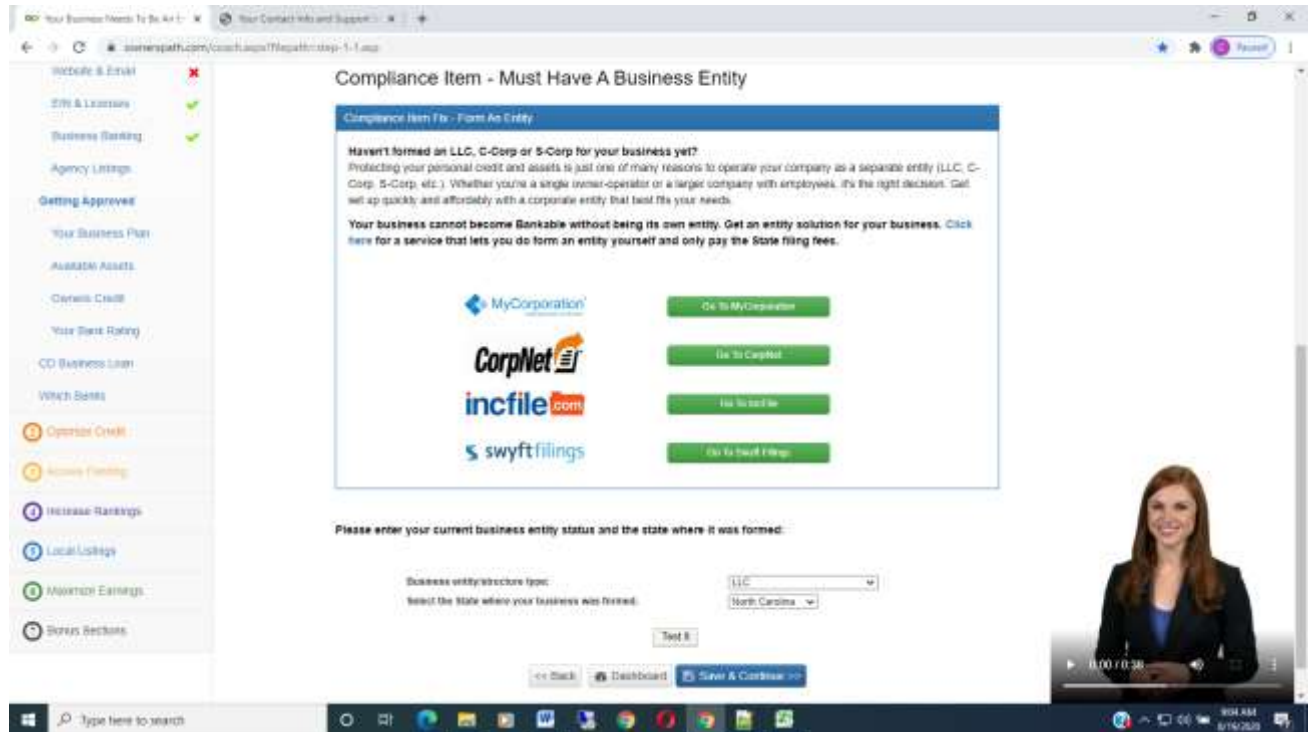
The screenshot shows the 'Private Label Settings' page in the OwnersPath administration interface. The page is divided into a left sidebar with navigation options and a main content area with a form. The form is titled 'Account > Private Label Settings' and contains the following sections:

- Primary Contact (Show if reliability contacts you)**
  - Primary Contact Name: Carly Pierce
  - Primary Contact Phone: 888-253-0188
  - Primary Contact Email: cpierce@ownerspath.com
- Member Support (Show on your website)**
  - Phone number for your member support: 888-253-0188
  - Email to send help desk tickets to: support@OwnersPath.com
- Funding Programs Support (Shown after funding program submission)**
  - Phone number for your funding program support: 888-253-0188
  - Email to send funding program apps to: support@OwnersPath.com
- Funding Range Reports (Shown after Funding Range Report completion)**
  - Phone number for your FRR program support: 888-253-0188
  - Email to send FRR program updates to: support@OwnersPath.com
- Completed Assessment Support (Shown in auto response emails and outlook sent to you)**
  - Phone number for your assessment support: 888-253-0188
  - Email to send completed assessments to: support@OwnersPath.com
  - Coverage Call:  Yes, I do

An 'Update' button is located at the bottom of the form.

## Private Label Setup Completion

4. **Your Affiliate/Partner Vendors** – Inside your Private Label success system are vendors who provide some fulfillment services for Lender Compliance and other items your members need to complete.



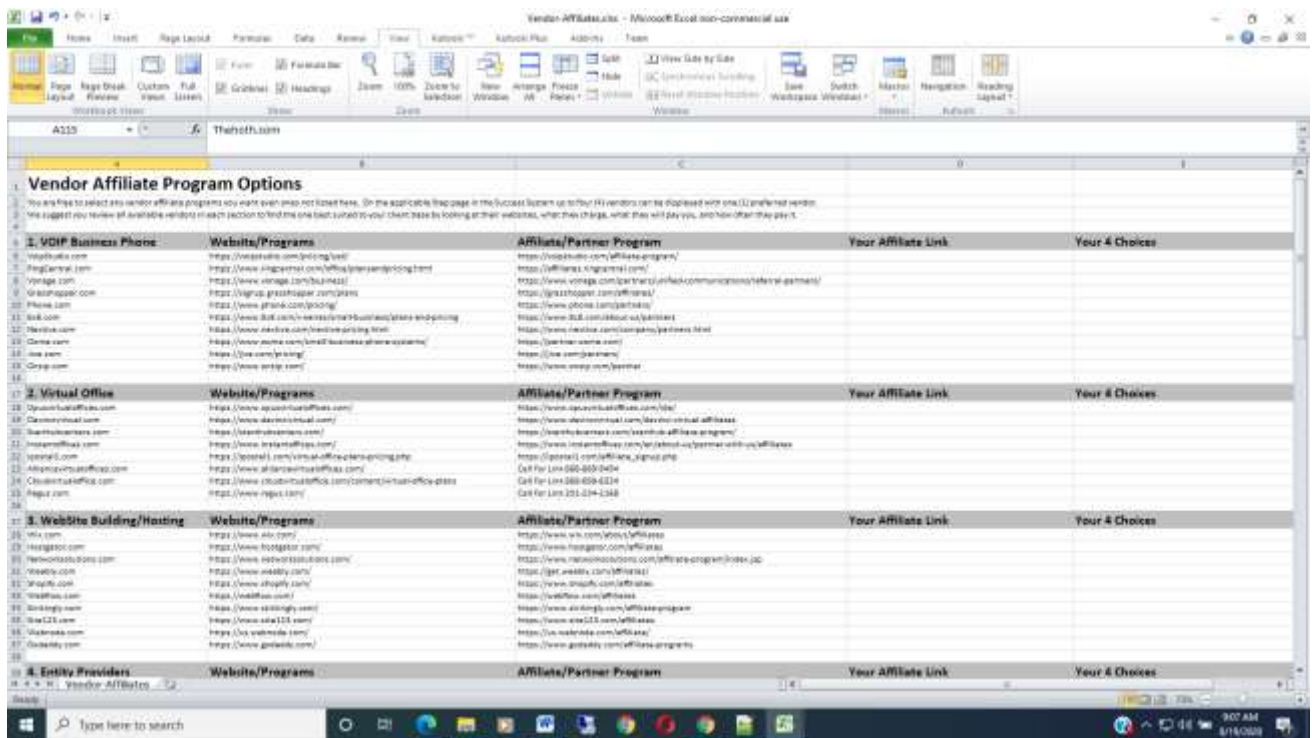
You have the ability to control these vendors and earn from them by having them point to your affiliate, partner or reseller links. We have provided a spreadsheet of known vendor affiliate programs for each of these vendor service areas. It is up to you to sign up for your selected vendors and return the completed spreadsheet:

## Private Label Setup Completion

5. **Your Vendor Selection Spreadsheet** – You have been sent an affiliate vendor selection spreadsheet.

These are suggested vendors that you have the ability to sign-up for their affiliate or partner programs and earn that revenue yourself for those Lender Compliance items that your members choose to work with to complete those items. You can place up to four (4) vendors in each lender compliance item area.

Complete and return the spreadsheet to us for implementation.

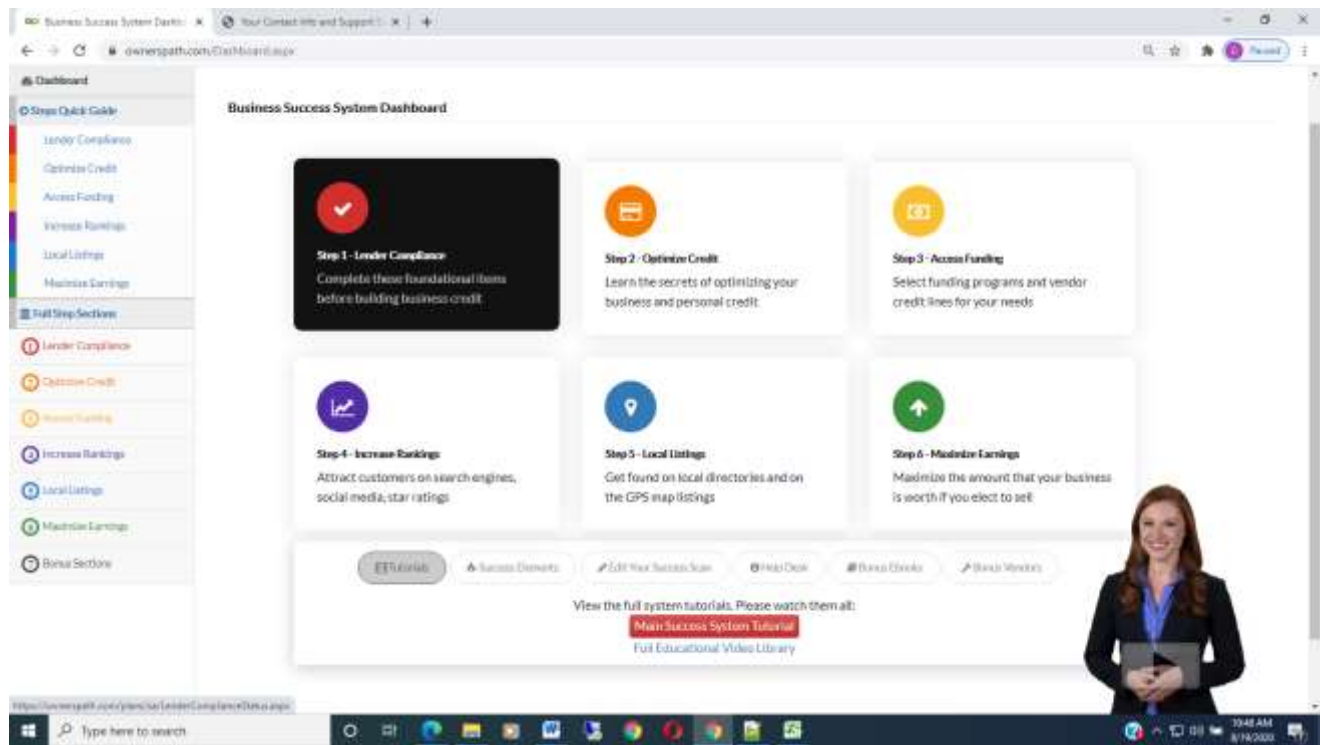


Vendor Affiliate Program Options				
You are free to select any vendor affiliate programs you want even ones not listed here. On the applicable flag page in the Success System up to four (4) vendors can be displayed with one (1) preferred vendor. We suggest you review all available vendors to find the one that suited to your client base by looking at their website, what they charge, what they will pay you, and how often they pay it.				
	Website/Programs	Affiliate/Partner Program	Your Affiliate Link	Your 4 Choices
<b>1. VOIP Business Phone</b>				
1	voipbible.com	https://voipbible.com/affiliate-program/		
2	ringcentral.com	https://ringcentral.com/affiliates/		
3	vonage.com	https://www.vonage.com/partners/affiliates/commercial-business/telephony-partners/		
4	grahncorp.com	https://grahncorp.com/affiliates/		
5	phone.com	https://www.phone.com/affiliates/		
6	800.com	https://www.800.com/about-us/partners/		
7	twilio.com	https://www.twilio.com/companies/partners.html		
8	comix.com	https://comix.com/		
9	800.com	https://www.800.com/		
10	800.com	https://www.800.com/		
<b>2. Virtual Office</b>				
11	OpenOffice.com	https://www.openoffice.com/affiliates/		
12	OpenOffice.com	https://www.openoffice.com/affiliates/		
13	OpenOffice.com	https://www.openoffice.com/affiliates/		
14	OpenOffice.com	https://www.openoffice.com/affiliates/		
15	OpenOffice.com	https://www.openoffice.com/affiliates/		
16	OpenOffice.com	https://www.openoffice.com/affiliates/		
17	OpenOffice.com	https://www.openoffice.com/affiliates/		
18	OpenOffice.com	https://www.openoffice.com/affiliates/		
19	OpenOffice.com	https://www.openoffice.com/affiliates/		
20	OpenOffice.com	https://www.openoffice.com/affiliates/		
<b>3. Website Building/Hosting</b>				
21	Wix.com	https://www.wix.com/affiliates/		
22	Hostgator.com	https://www.hostgator.com/affiliates/		
23	Web.com	https://www.web.com/affiliates/		
24	GoDaddy.com	https://www.godaddy.com/affiliates/		
25	GoDaddy.com	https://www.godaddy.com/affiliates/		
26	GoDaddy.com	https://www.godaddy.com/affiliates/		
27	GoDaddy.com	https://www.godaddy.com/affiliates/		
28	GoDaddy.com	https://www.godaddy.com/affiliates/		
29	GoDaddy.com	https://www.godaddy.com/affiliates/		
30	GoDaddy.com	https://www.godaddy.com/affiliates/		
<b>4. Entity Providers</b>				
31	Entity Providers			

## Private Label Setup Completion

6. **Your Member's Success System** – Your private label comes with a Demo account ID: **demo123** PW: **demo123** for either sales or staff training purposes.

Please note that on the dashboard there are links to all the tutorial and promotional videos, links to the promotional e-books. To the bonus vendors, help desk support, and the ability for your members to update their success scan questions.



\* \* \*

We greatly look forward to the success of your Private Label. Please let us know what we can do to further assist you in funding small businesses and helping them to get and stay on the success path.

We have found that by far the most successful and satisfied system members are those small business owners who have first been funded before placing them into your Success System. These member clients have the resources they need to complete all 12 success elements and to do the things that their coaches will need for them to do.

**We ask you to please set the proper expectations for your system and focus on funded members.**