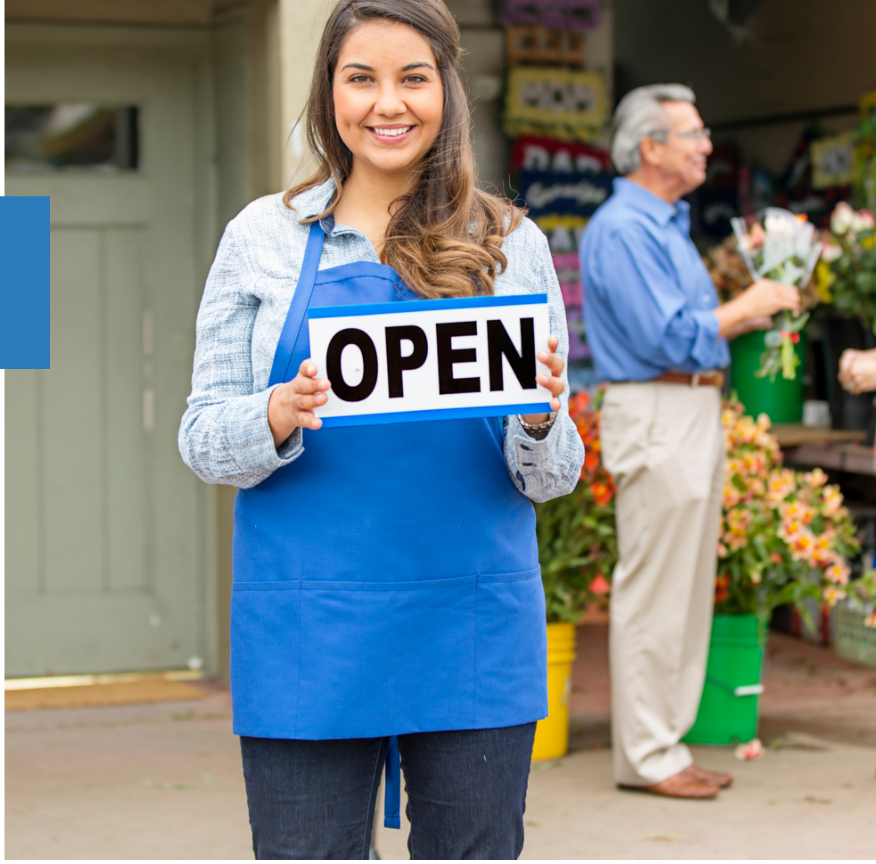
SMALL BUSINESS CONSULTING

Full Service SSBCI



Client Intake Services and Technology

Your clients are referred through our web-based referral form by your organization or approved ESOs in your network. This information routes into our proprietary CRM, which stores their data for follow-up, documenting activity, and invoice and grant substantiation.

Triage and Initial Screening Services

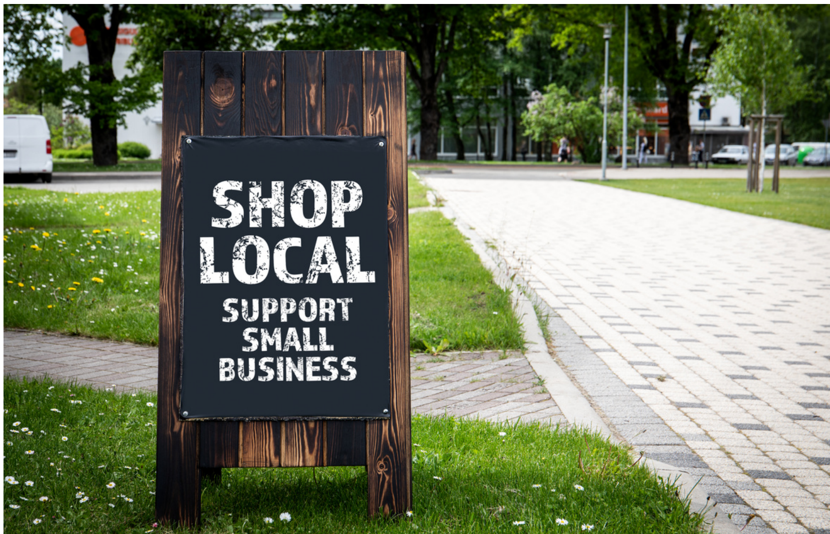
Your clients receive calls and emails from our general business consultant to pre-screen the applicant, confirm qualifications, diagnose issues and determine next steps. The clients can be directly routed to your organization with an initial screening and recommended next steps or directly routed to one of our consultants to provide the needed technical assistance.

Documentation Collection and Loan Application Assistance

Applicants who have an interest in applying for loans but don't have proper documentation are assigned a consultant who will help them understand the required documents, locate or request required documents, and compile financial and non-financial documents into a loan package and ensure your client submits a complete and accurate loan application for your review.

Financial and Accounting Advisory Services

Your clients work directly with QuickBooks Pros, financial professionals, and other experts to ensure they have accurate books, realistic revenue and expense projections, understand the risks of debt and ongoing debt service, and address any other financial issues or requirements of the program and responsible business ownership. This service also includes financial statement compilation from past books/lack of books, and conversion of manual or spreadsheet accounting to QuickBooks for accurate reporting.



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Pre-Loan Credit Repair and Counseling

Your clients work with a professional credit counselor to understand the cause of their credit issues, analyze their financial situation, and develop an informed and effective plan to quickly improve your client's credit score and overall creditworthiness. Specialized software, such as Credit Generator and Dispute Panda are used to ensure professional-level service and expedite credit building and repair with no additional charges to your client.

Continued Financial Consulting

Your clients continue their relationship with our consultants to ensure their capital is used in a manner that is sustainable, has a meaningful impact on the business, and provides a high ROI. Targeting areas such as staffing, revenue generation, marketing, procurement support, budgeting, and scalability with a professional small business consultant will improve your client's success in using funds to sustain growth and will likely improve the performance of your portfolio.

Continued Accounting Training and Support

Your clients are taken through the set-up and training process, and meet regularly with our consultants to review their books for progress and errors. Your clients benefit from our QuickBooks accountant profile allowing us login and see the actual books of our clients to provide them with real (not conceptual) information on an ongoing (sometimes bi-weekly) basis.

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Impact Attestation and Recognition

Our consultants will conduct outreach to gather and record the positive outcomes resulting from your organization's endeavors, help participants recognize the program's impact, and allow your organization to report impacts accurately to stakeholders and funders. Impacts will be recorded in and reported from the same custom CRM used for all other reporting for data continuity and accuracy.

Consultant Management Services

If you would like to hire local consultants but prefer to only have one point of contact, management team, reporting organization, and a single invoice for all services, we offer a managed service provider option to have your local consultants join our team, operate under our processes and systems, and include their work, notes, and time on our invoice substantiation and reporting.

*Please note these services are in addition to the services list on our one-sheet and workshop brochure.

*There is no additional charge for the use of our CRM for intake, data storage, and reporting if no major upgrades are needed.