



Cash Flow Management Software That Helps Your Agency Grow More Profitably

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Agenda

- Platform & Partner Summary
- Emerging Insurance Agency Challenges
- Charter Membership Intro
- The Business Problem & Solution
- FINSYNC Mission
- The Platform
- Case Studies
- Charter Membership Details
- Revenue Share to Agency
- Getting Started



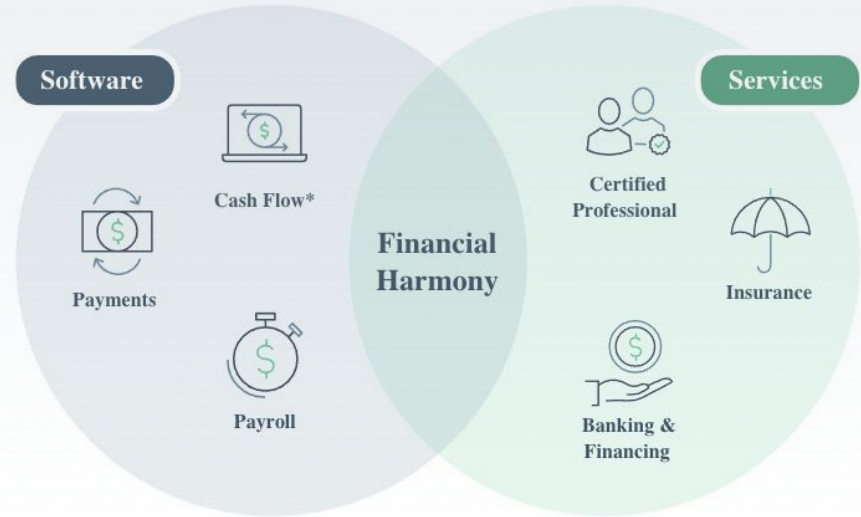
Summary

FINSYNC HARMONY FOR BUSINESSES & THEIR SERVICE PROVIDERS

FINSYNC provides an all-in-one payments platform that helps businesses:

- ✓ Centralize control of payments
- ✓ Automate accounting
- ✓ Process payroll
- ✓ Manage cash flow (the “software”)
- ✓ Connect with members of the FINSYNC Network for banking, financing, accounting and insurance needs (the “services”)

Banks, credit unions, accountants and insurance agents join the **FINSYNC Network** to connect with customers resulting in more profitable results for all parties.



*Cash Flow:
Accounting & Cash Flow Management



Agency Owners Face Increased Competition & Challenges

Intuit/QuickBooks is now marketing insurance products and services to their small business customers via Next Insurance and is creating an offering for the employees of these small businesses that will include insurance and investments. Hippo, Lemonade and others have raised hundreds of millions to digitize insurance.

Summary:

- QuickBooks is not trying to help agency owners build relationships with small business customers and their employees. In contrast, FINSYNC connects agency owners to businesses and their employees.
- New entrants are investing heavily to disintermediate existing relationships.
- Businesses need digital solutions, but also great service. This is where FINSYNC sees a growth opportunity by connecting businesses and their employees to agency owners who can deliver amazing service with new technology.



How FINSYNC Helps Agency Owners

FINSYNC created a cooperative structure with a network of agency owners to help them market their services within FINSYNC's software in order to win and retain new customers.

To further help our partners grow, we are offering a new class of membership, **Charter Membership**, that comes with the benefit of additional marketing support, increased earnings potential (royalty-based profit sharing), and many other benefits.

For a limited time, you can join as a Charter Member for \$100 per month. No long-term contract required.

CHARTER MEMBER - OPPORTUNITY BY THE NUMBERS.

\$70,000

Increase income per business using FINSYNC for cash flow management by an average of \$720 per year. 100 referrals could add an additional ~ \$70,000 in recurring revenue.

\$1,620

At no charge, your agency can use FINSYNC's complete solution for payments, payroll, accounting and cash flow management. A savings of \$1,620 per year for an agency with 5 employees.

\$1,500

As a Charter Member, you get a listing in the FINSYNC directory that will help you promote your products and services to attract and retain more customers.

Priceless

Coming in 2021: Charter Members will be able to use a portal to connect with any other member of the Network to approve and close more policies.



The Business Problem

The old way businesses operated was decentralized and disconnected from accounting software and financial professionals. Bookkeeping, cash flow management and interacting with bankers, accountants and insurance agents in a timely, topical fashion were challenging.

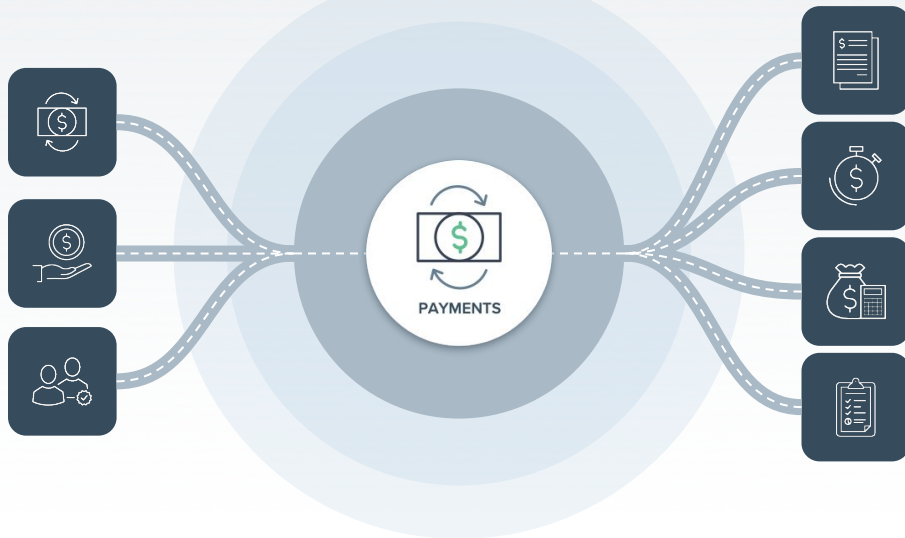
- ✓ Slow Payments
- ✓ Less Control
- ✓ Incomplete Data
- ✓ Inefficiencies
- ✓ Greater Operating Cost
- ✓ Higher Financing Rates
- ✓ Less Secure
- ✓ Service Challenges



The Solution for Businesses & Agents

FINSYNC's all-in-one platform automates accounting as payments are processed and is backed by an integrated, top-tier network of bankers, accountants and insurance agents, resulting in the best way to manage cash flow and grow the business more efficiently and profitably.

- ✓ Faster Payments
- ✓ More Control
- ✓ Real-Time Analytics
- ✓ Greater Efficiency
- ✓ Lower Operating Cost
- ✓ More Secure
- ✓ Unmatched Service
- ✓ Faster Access to Lower-Cost Capital





OUR MISSION

Help small to midsize businesses grow and succeed with innovative software and unmatched services working in partnership with banks, accountants and insurance agents.



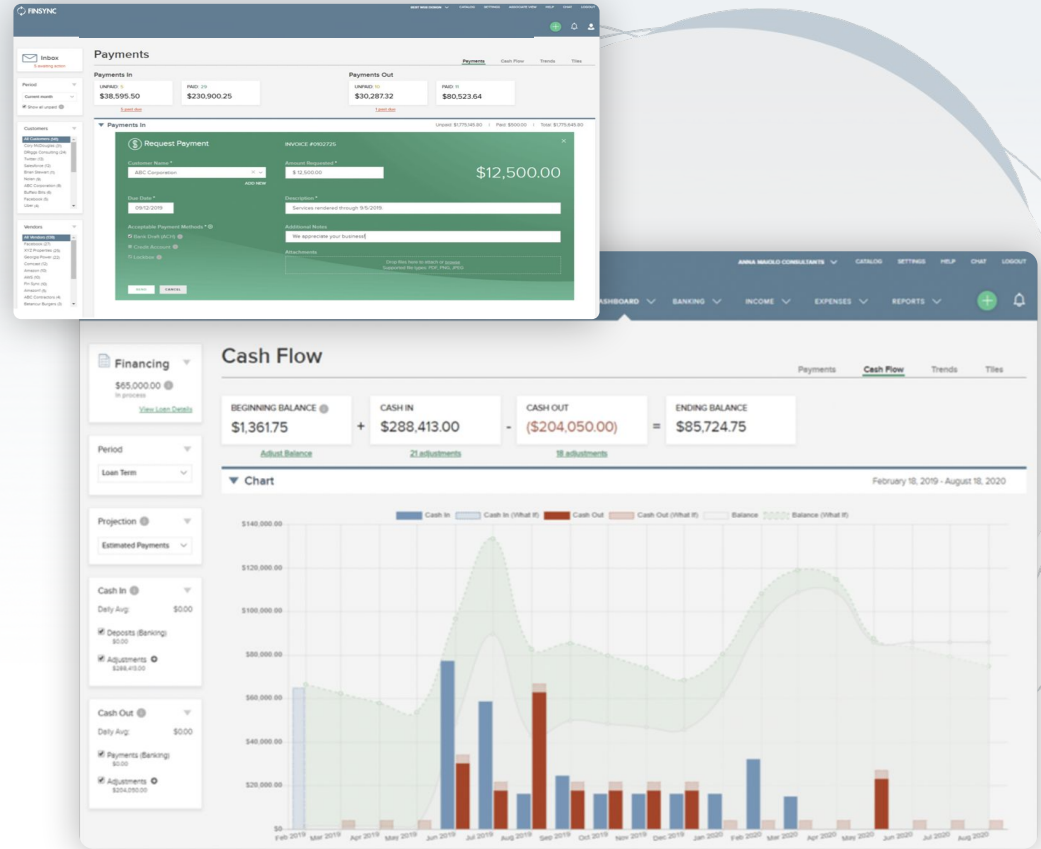
The Platform

FINSYNC helps all types of businesses across all industries process payments and get in sync with the right financial professional at the right time.

Going beyond payments and services, FINSYNC's full suite of cash flow management features is ideal for businesses seeking an all-in-one platform for invoicing customers, paying bills, processing payroll, managing projects and forecasting cash flow.

INDUSTRIES INCLUDE:

- ✓ Professional Services
- ✓ Construction
- ✓ Healthcare
- ✓ Retail
- ✓ Food & Beverage
- ✓ Non-Profits



Platform Comparison

FINSYNC is pioneering a new class of financial management software: Cash Flow Management. A business can start with payments and add modules to further centralize control and grow with less time and cost.

Capability	FINSYNC	PAYPAL	QUICKBOOKS	BILL.COM	GUSTO	HARVEST	FUNDERA	UPWORK
Payments	✓	✓						
Invoicing	✓	✓	✓	✓				
Bill Pay	✓	✓	✓	✓				
Accounting	✓		✓					
Payroll	✓		✓		✓			
Project Management	✓					✓		
Financing	✓	✓	✓				✓	
Services	✓							✓
Cash Flow Management	✓							

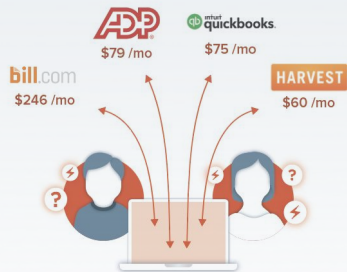


Case Study

The Cash Flow Management Solution

Before FINSYNC Management Solution

- Quickbooks for accounting
- ADP for payroll
- Bill.com for paying vendors
- Harvest for time tracking



\$460/mo

After FINSYNC Management Solution

- Accounting replaced Quickbooks
- Payroll replaced ADP
- Time tracking replaced Harvest
- FINSYNC Pay replaced Bill.com & more to pay vendors and accept credit card and ACH payments from customers



\$165/mo

	THE OLD WAY	FINSYNC
Apps	4 apps	1 app
Software	\$5,520	\$1,980
Accounting Services	\$105,460	\$46,245
Time (in hours)	2080	1040

Total Value to Client

Software Savings	\$2,755
Services Savings	\$59,215
Time Savings	120 hours

Software Fees	\$396
Services @ 20%	\$1,850
Credit Card fees*	--

Total Partner Revenue Share PER YEAR **\$2,246**





WATCH TESTIMONIAL

"I had been using Quickbooks Online because I was told it was the industry standard. FINSYNC told me I could spend less and get more – and they were right. I used to write paper checks out for some vendors – now I just click a button. And real people answer my questions when I write, and they call me to point out things I may have missed."

Andy Rostad, Partner

MEDIA BEYOND Marketing Agency, Chicago





THE PREFERRED PLATFORM FOR AGENCY OWNERS



FINSYNC is used by agency owners of all types and sizes across the country.



Ponsness Agency

Success Story

PROFILE

- Farmers agent in Moses Lake, Washington
- Purchased an existing agency and committed to growth rooted in protecting client assets
- Active in community and church

VALUE DISCOVERED

- Simple small business solution
- Service that beats the “big box” competitor
- A growth partnership that goes beyond software



“FINSYNC’s all-in-one solution saves me time and money, so I can focus on growing my agency. I would recommend it to other agency owners.”

— Mary Ponsness

Agency Owner, Farmers Insurance



LISTEN TO MARY’S STORY



Stover Insurance Agency

Success Story

PROFILE

- Second generation in insurance business
- Launched own agency in 2019 with Farmers
- Survived the challenges of launching a small business and is thriving

VALUE DISCOVERED

- Easy to launch new business operations on FINSYNC
- Utilized services network for accounting/tax assistance
- Growth potential expanding with commercial clients



“In launching a new agency, I needed a solution to make things simple and help me manage. FINSYNC does that. And I love the idea of having a partner to help me grow with commercial insurance clients.”

— Ben Stover

Agency Owner, Stover Insurance Agency



Charter Membership



The Benefits of Charter Membership

For a limited time, you can join as a Charter Member for \$100 per month and receive the following benefits.

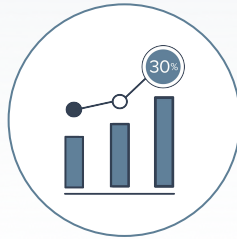
No long-term contract required.



Free Software

At no charge, your agency can use FINSYNC's complete solution for payments, payroll, accounting and cash flow management.

A savings of \$1,620 per year for an agency with 5 employees.



Increase Income

Instead of the traditional 10%, you can earn 30% revenue share when you refer FINSYNC to businesses for cash flow management.

100 referrals could add an additional ~ \$70,000 in recurring revenue.



Grow Your Customer Base

FINSYNC will match you with businesses and their employees looking for an agent in your market.

A savings of \$125 per month starting April 2021.



Approve & Close More Policies

Coming in 2021: You will be able to use a portal to connect with any other member of the Network to approve and close more policies.

A great way to acquire and retain customers longer.



Additional Benefits

Work with peers and customers to deliver best in class technology and services.



Collaborate & Innovate

Participate in events held for you, your peers and your business customers so we can share best practices, learn and continue building solutions that help all parties grow more profitably.



Grow as the Network Grows

When all Charter Members work together to deliver best-in-class solutions, you and your business customers win.



Revenue Share Details

Limited time offer (Charter Members)

30%

Revenue Share

\$720

Per Year, Per Customer

A customer with the profile below using FINSYNC for cash flow management represents a \$2,400/year relationship. 30% revenue share to the agency would be approximately \$720 in new income per customer.

Customer Profile

- 15 Employees on Payroll, 2 pay periods per month
- 30 ACH transactions per month
- 30 Checks or Lockbox per month
- \$15,000 monthly charge card volume

FINSYNC Fees

\$45 Accounting & Cash Flow Management Software

\$95 Cash Flow Management Plus Payroll & Projects

\$0.50 per ACH

\$1.00 per Check

\$4.00 per employees per pay run for tax reporting and remittance¹

2.9% plus **\$0.30** per charge card transaction¹

1. Volume discounts apply

Revenue Share Based on Numbers of Customers

Number of Customers	Annual Revenue Share to Agency
250	\$180,000
100	\$72,000
50	\$36,000
25	\$18,000



Join the FINSYNC Network as a Charter Member

- ✓ Run your agency on FINSYNC for free (accounting, payroll, cash flow management)
- ✓ Participate in programs designed to help you increase profits
- ✓ Grow your agency by being matched with new businesses and individuals looking for a local agent
- ✓ Promote FINSYNC to other businesses:
 - Build long-term relationships with your clients
 - Increase recurring revenue



Get Started Today

www.finsync.com

Enroll Online

Agree to Terms

Straightforward terms & conditions.

Say Hello

Meet your Success Manager

Your partner success manager will be in contact to provide you co-branded marketing material and assistance.

Let's Grow

That's It

We'll take care of your referrals, share revenue and provide matches to you.



Thank you



Appendix

Claim Your Collateral

One-Pager

A Co-Branded, 2-Sided Marketing Slick (PDF) for Distribution

- ✓ Email
- ✓ In-person (high-res print)

Contact our Director of Partnerships to claim yours.

 Your Agency Name Here

Experience Financial Harmony and a Better Way to Grow Your Business

Example Agency is part of the FINSYNC Network, built to help you experience financial harmony and a better way to grow your business.

Complete the [online form](#) to meet your own, dedicated Concierge Representative who will help you determine whether or not FINSYNC is right for your business and if so, go on to help you get started and save time and money.



Better Together

When you combine payments, payroll, accounting and cash flow management with built-in services, you'll experience financial harmony and the best way to grow your business more profitably.

Cash Flow:
Accounting & Cash Flow Management



Finances Are Better In Sync

Unlike QuickBooks and similar accounting applications, FINSYNC is an all-in-one payments platform that automates accounting, streamlines payroll and helps you manage cash flow, and connect with top-tier bankers, accountants and insurance brokers.



We Measure Our Success Through the Success of Our Customers

	The old way	FINSYNC
Apps	4 apps	1 app
Software fees	\$5,520	\$1,980
Service fees	\$105,460	\$46,245
Time (in hours)	2080	1040

TOTAL VALUE TO CLIENT

\$2,755 <small>SOFTWARE SAVINGS</small>	\$59,215 <small>SERVICE SAVINGS</small>	1040 <small>TIME SAVINGS</small>
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The old way businesses managed payments, accounting and cash flow was decentralized. FINSYNC's centralized approach helps you get all your finances in sync and get in sync with the right financial professional at the right time, saving measurable time and money.

We have customers who have saved tens of thousands of dollars per year moving from many different applications to a single platform.

We're Committed To Your Success

In order to succeed long term, you need software that will help you scale most efficiently, reliable help from trusted accounting professionals, a relationship banker, and the right insurance at the right time.



Software Solutions

- ✓ Invoice customers and receive payments faster
- ✓ Pay bills with ease
- ✓ Process payroll online with less cost and greater confidence
- ✓ Automate accounting
- ✓ Project cash flow



Professional Services

We take a needs-based analysis to match you to the right financial professional who is best qualified and positioned to help you grow.

Meet Your Dedicated Concierge Representative Today

Whether you need help finding an accounting professional, relationship banker or getting started with cash flow management software, we're here to help.

→ [Get Started](#)



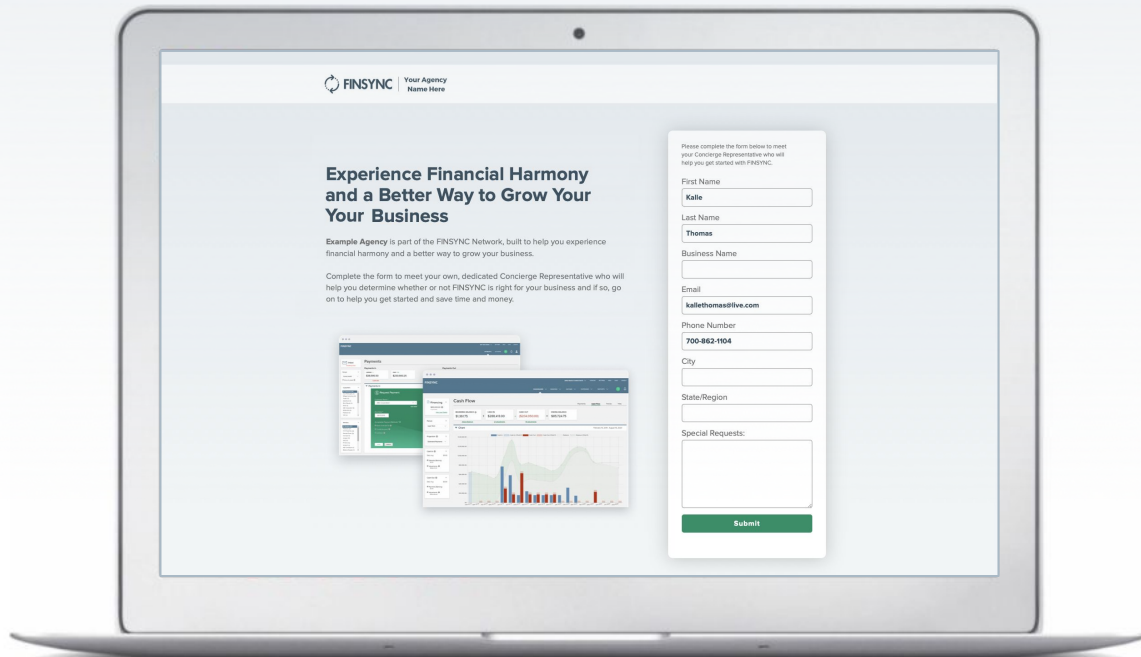
Claim Your Collateral Landing Page

A Co-Branded, Digital Landing Page

- ✓ Easy to use URL
- ✓ Contact form completions go directly to you

Contact our Director of Partnerships to claim yours.

[→ Click to See Example](#)



Email Template 1

New Business

Customer Profile

- ✓ Is setting things up
- ✓ Needs room to grow
- ✓ Wants to keep owner admin time to a minimum
- ✓ Needs your insights

Dear [Client],

I have some exciting news for you. In addition to helping you with your insurance needs, I can introduce you to the FINSYNC back-office platform that scales as your business grows.

You can get started with Cash Flow Management + Accounting and add Payroll and Projects modules when needed.

FINSYNC is a great platform to grow your business because it provides an all-in-one back solution, so you'll keep admin time and software expenses to a minimum. It also makes connecting with me for insurance as well as top-tier accountants and bankers easier when you need them.

I would like to introduce you to the FINSYNC team. What's your availability for a call over the next week?

Warmest regards,
[Your Signature]



Email Template 2

Consolidation

Customer Profile

- ✓ Has adapted cloud software
- ✓ Is losing time and money using too many apps
- ✓ Struggles to project cash flow
- ✓ Wants to be more strategic
- ✓ Needs your insights

Dear [Client],

I have some exciting news for you. In the past, moving your business administration to the cloud meant you had to subscribe to multiple financial applications, keep them reconciled, and keep your team trained on each interface.

I'm now pleased to support you on the FINSYNC Cash Flow Management platform. In addition to making managing your insurance needs simple, it's an all-in-one back-office solution that allows your team to work with a single database and real-time data to more quickly grow your business.

I would like to introduce you to the FINSYNC team. What's your availability for a call over the next week?

Warmest regards,
[Your Signature]



Email Template 3

Frustrated

Customer Profile

- ✓ Is feeling like 2020 admin was way too much work/complexity
- ✓ Wants to start 2021 on the right foot
- ✓ Views the calendar year end as the ideal time to implement new tools
- ✓ Needs your insights

Dear [Client],

I wanted to ask how 2020 is wrapping up for you from an administrative perspective. If you're like other businesses, getting 2021 started on a better foot is top of mind.

With FINSYNC's all-in-one cash flow management solution, I'm able to help you with more than just insurance.

You can grow your business with less administrative time and software expense as well as more easily analyze your future cash flow. In addition to a streamlined insurance experience, you can connect with top tier banking and accounting professionals as well through the platform.

I would like to introduce you to the FINSYNC team. What's your availability for a call over the next week?

Warmest regards,
[Your Signature]

