



Financial Institution Client Resource Center

# Implementation Guide

Version 2.0  
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In strict commercial confidence  
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## Unifimoney: Your *Digital* Wealth Management Partner

Unifimoney is an investment and money management platform built to simplify, diversify, and unify your customers' money management. Through the integrated offering they can manage and grow wealth effortlessly and in one place with the most comprehensive investment platform in the market, including passive and active investing in stocks, ETF's, precious metals and digital assets.

*Turn your online / mobile banking into a money superapp.*

Multiple asset classes (equities, metals, digital assets) all in one place

One of the most comprehensive digital wealth management platforms in the market

Pre-enabled into digital banking - *configuration not technical integration*

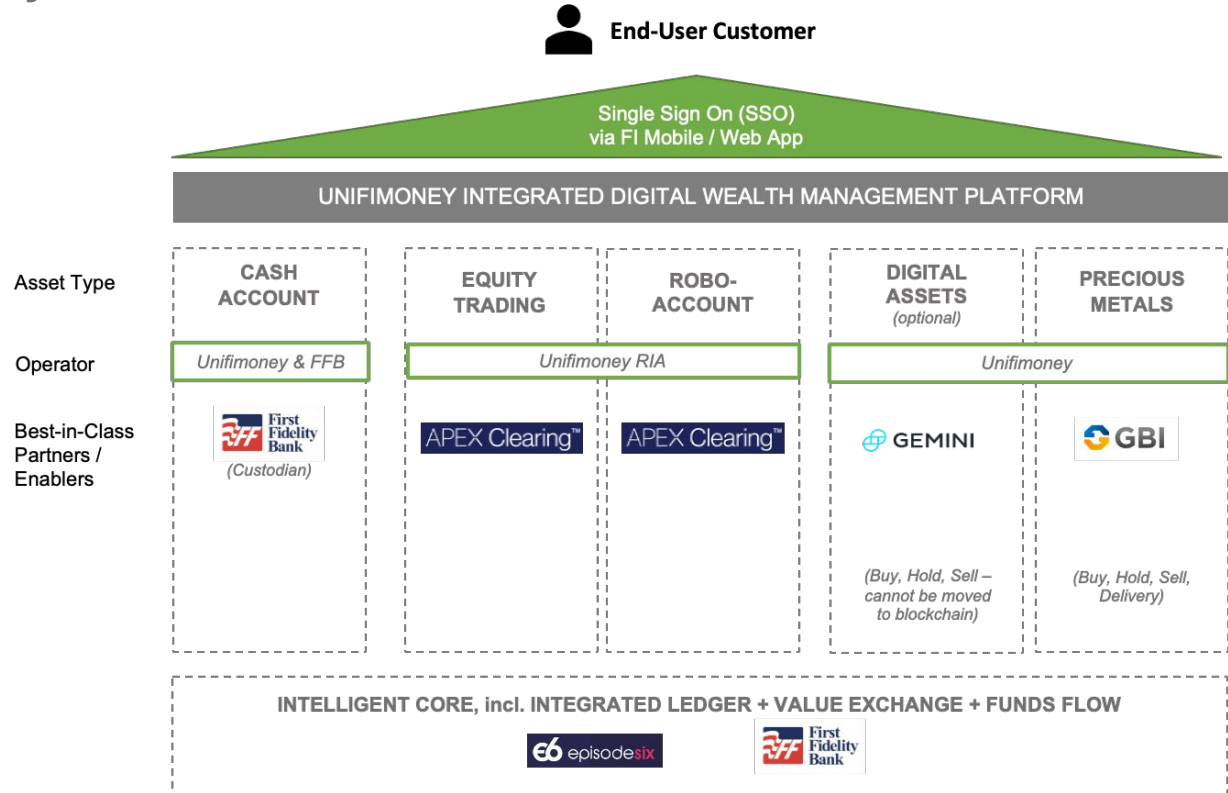
Your partners in the battle against deposit loss

No lock In's or punitive contracts






We fully support Compliance, Risk, Marketing and ROI model.

# The Integrated Unifimoney Model

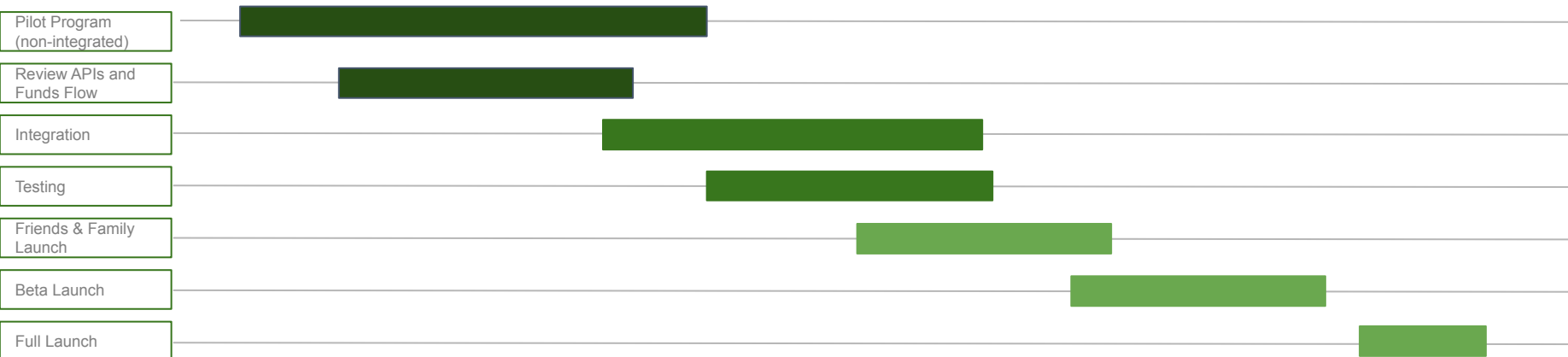
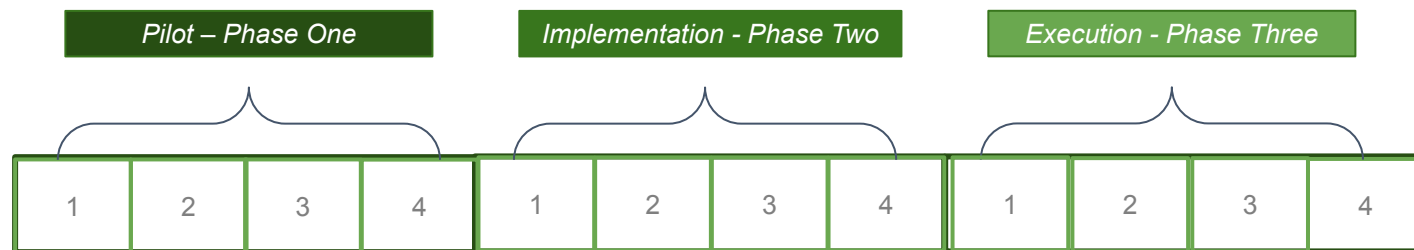
- The Unifimoney Platform unites the offerings and capabilities of numerous market-leading exchanges, trading platforms and vaults into one single wealth management experience
- Customers are able to access an unrivalled spectrum of asset classes through a single app
- Unifimoney's ecosystem is offered as a closed loop or "walled garden", and funds can only enter and exit through the connected cash account



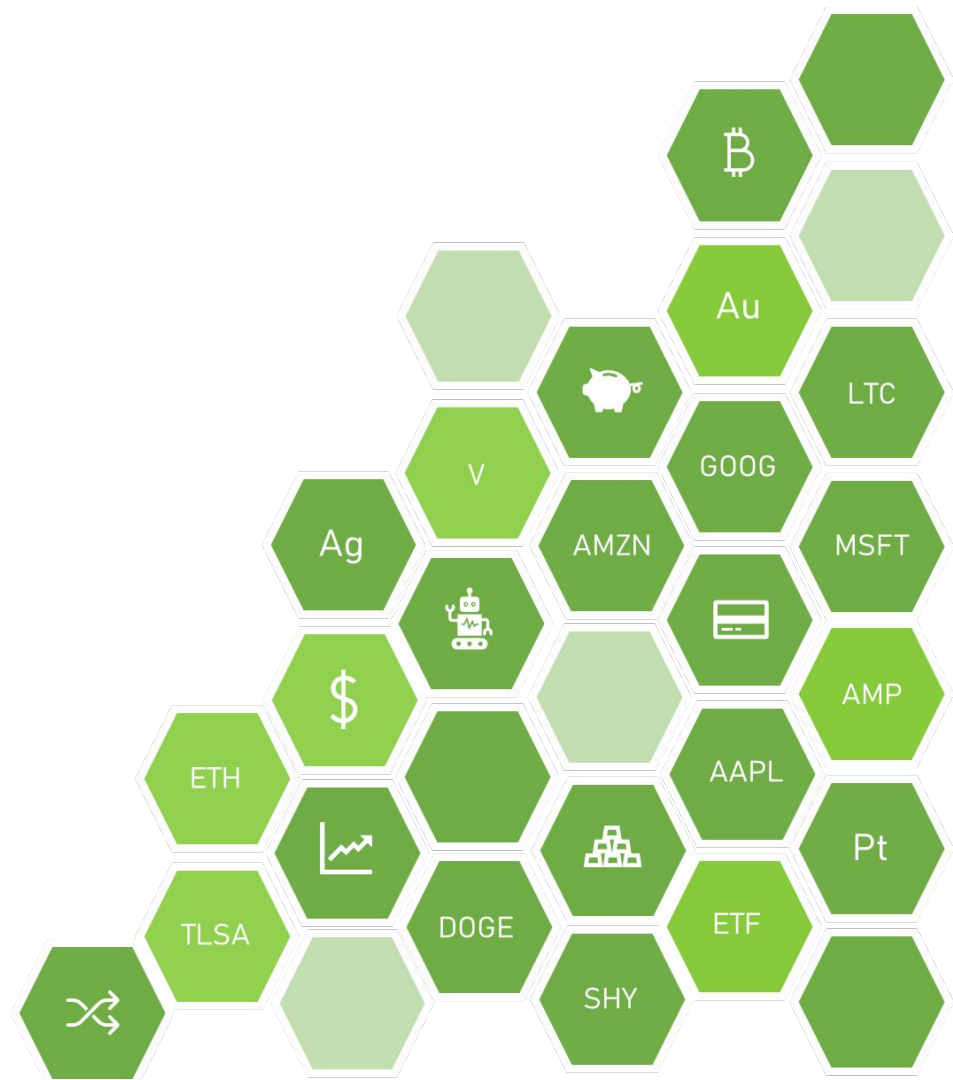
## Getting Started, What you can expect ...

-  Path to Go-Live
-  Customer Support Model
-  Employee Training
-  Marketing
-  Dashboards and Reporting

# Path to Go-Live



# Post-Pilot Execution



# Unifimoney Support Model

*(Support model during full integration with the Unifimoney Platform)*

## Empower FI Support Infrastructure

We will train FI Resources to provide the First-Line of Support

Initial questions are often solvable via a general knowledge of the products and services offered

## Second Line Escalation

For questions or topics that cannot be solved by the FI's own support infrastructure, Unifimoney provides more specialized dedicated support

## Ownership, Efficiency, Resolution

Our support agents will take ownership of any escalated issues brought up by our customers.

Our goal is to resolve the customer's issue as quickly & efficiently as possible.

## Support Mediums

Email and Phone. We utilize Zendesk as our Customer Support ticketing software. We will add chat through Zendesk once we are ready to scale.

## Ticket Service Level Agreement

48 hrs - we respond to customer inquiries (emailed to our app support inboxes) in our Zendesk queue in a timely manner and give the buffer of 48 hours as the longest delay a customer can expect from our Customer Support agents.

## Growing with your Program

Our scalability model will depend on a number of factors including the max number of customers you foresee your FI scaling with Unifimoney

Our goal is to work together on a scalability model that works best for your business and customers.

# Employee Training

- During the implementation phase Unifimoney will work with your FI's Human Resource, Compliance and Marketing Depts to create a program for branch and support staff training.
- Live and recorded webinars, AMA's and ongoing training will be provided to appropriate FI staff (including branch staff)
- Updates and promo availability will be communicated to the staff via email
- Branch marketing material will be provided for walk-in clients.





# Marketing Support



## The Best Investment App Is Your Bank.

At [FI name], we strive to provide you with the latest and greatest products and services to help you live the life you want.

That's why we're thrilled to bring you a comprehensive and innovative investment platform, built right into our online/mobile banking app. Now, you can access a range of self-directed investment services, including ETFs, cryptocurrencies, precious metals, equities, and much more.

Whether you're trying to save for retirement or a down payment on your first home, you have a world of opportunities at your fingertips with [FI name].

FI Logo Goes Here

### A World of Investing:

 AI-powered Robo-Advisor

 Commission-free\*, fractional trading

 A large variety of cryptos to choose from

 Retirement accounts

 Diverse stocks and ETFs

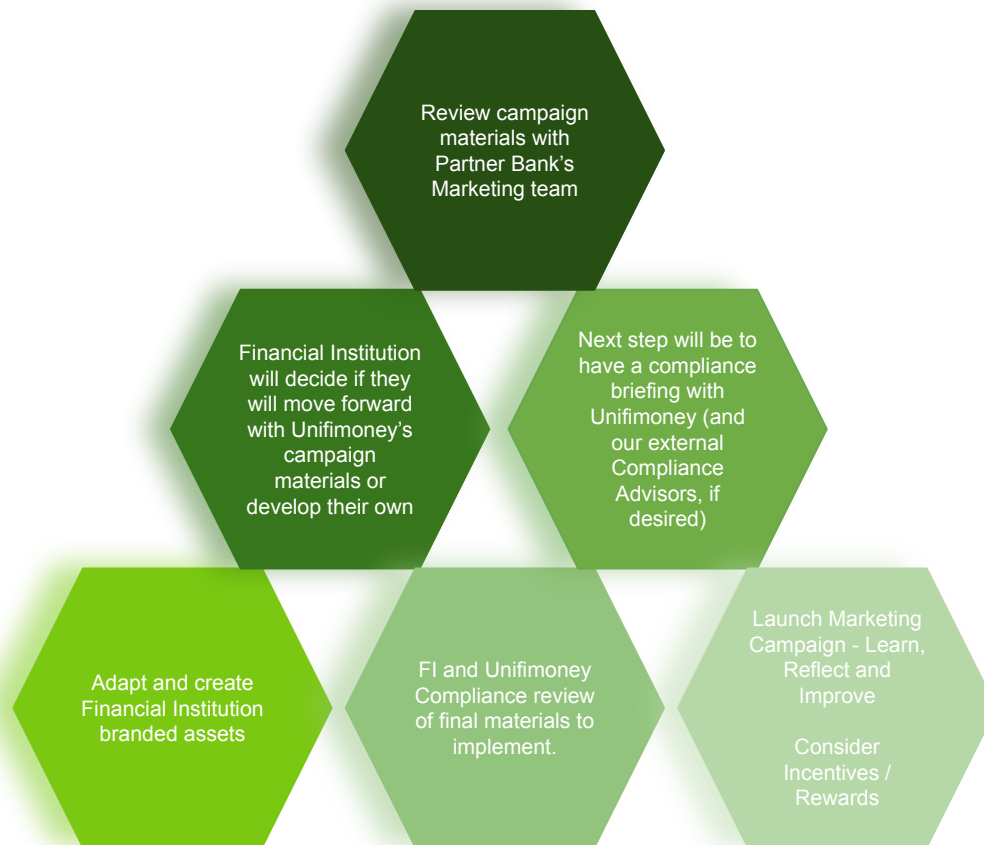
 Precious metals including gold and platinum






Access Unifimoney from the Investing tab of our online/mobile banking app!

Investing powered by: 

Unifimoney, Inc. and [FI name] are not affiliated.  
Investing involves risk, including possible loss of principal. Investment advisory services are provided by Unifimoney RIA, Inc., an SEC-registered investment advisor. For important information and disclosures relating to this site, investment accounts, and [FI name], visit <https://www.unifimoney.com/legal>. Brokerage services are offered through APEX Clearing and Custody, a registered broker-dealer, member of FINRA and SIPC. Your cash and investments are protected by SIPC up to \$500,000, with a limit of \$250,000 for cash. APEX Clearing and Custody is SIPC type 1, GDPR and CCPA compliant. Registered in all 50 U.S. states. You can check the background of this firm on FINRA's BrokerCheck. Cryptocurrency trading is offered through GIBONE, a digital asset platform operated by and proprietary to Gemini Trust Company, LLC, a New York trust company. Precious Metal trading is offered through GIB, a New York-based precious metals dealer. Investment products are not FDIC insured - No Bank Guarantee - May Lose Value.  
\* Unifimoney does not charge a commission on self-directed trading. However, other charges may apply.



# Dashboards and Reporting

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 The dashboard will provide the Financial Institution with access to performance data (e.g., customer sign-ups, AUM, etc.)
- 
 We will provide tracking for financial performance and invoicing
- 
 We will collaborate with the FI for the design of the dashboard to ensure it meets their expectations and the appropriate valuable information is being captured and reported



*(Example Dashboard)*

