

Private Label Options



The Future of
Estate and Legacy
Planning
Technology



Yourefolio

Flexibility to meet your needs

Yourefolio's Private Labelled sites create flexible options to meet the specific needs of your practice. We understand that everyone works in unique ways. We have designed the platform to provide customizable options. This guide is a summary of the options we provide as you look to make Yourefolio your very own platform.

Branded, not "Co-branded"

Yourefolio's Private Labelled sites provide a unique feel for your client's experience. When we design your site, we remove all reminders that it is powered by Yourefolio. Your clients will believe that this is your software. They will believe you designed it, you programmed it and made it available for their experience.



Not all software's are created equal

We do all the work

Our customized Private Labelled sites are crafted for you. While working through our core application, take note of what you would like to change. Complete our document outlining your changes and we will do all the work.

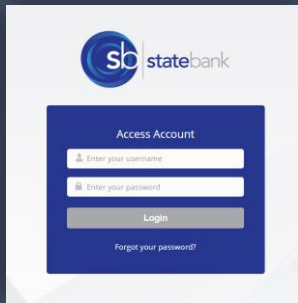
The ultimate client experience

Parlay our software with your expertise to create the perfect client experience. Yourefolio is the platform created by professionals to help you design a unique experience. Privately labelling that experience is the best option to take your estate planning offering to another level.

Prices that won't break your bank

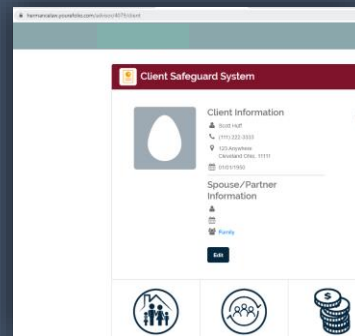
While a Private Label site may sound like an expensive option, it isn't. Private Label sites start at \$1,999 and provide plenty of flexible options. Our goal is to enhance your experience and provide you with options without breaking your bank. Building your own software will cost millions. Provide a million-dollar software experience to your clients using customizable, inexpensive options through Yourefolio.

It's your platform, design it your way...

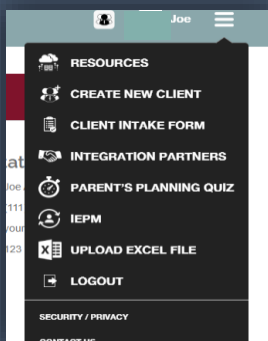


Clients' login on your website, with your companies' color and branding

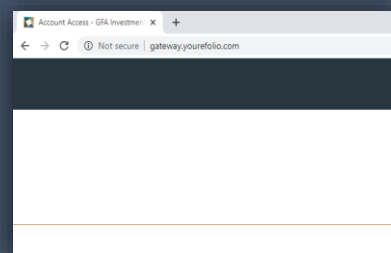
Colors, word changes to create a unique client experience



Modify modules, questions or titling of tiles/links and other options within the platform



Sub-domains of Yourefolio so your clients see your company first



Pricing and Options

Customization Options	Tier One	Tier Two	Tier Three
Logo Branding	✓	✓	✓
Separate Database	✓	✓	✓
Subdomain of Yourefolio	✓	✓	✓
Word/Question Changes	✓	✓	✓
Administrative Licenses (2 per advisor)	✓	✓	✓
CCS Site Color Changes		✓	✓
Personalized Success Program		✓	✓
Permission and Roles		✓	✓
Dashboard Customization			✓
Personalized Mobile App ²			✓
Personalized Drafting Documents ³			✓
Module Customization			✓
Add Module/Integrations			✓
1-10 users	\$2,000 ¹	\$3,500 ¹	\$25,000 ¹
11-25 users	\$5,000 ¹	\$10,000 ¹	\$55,000 ¹
25+ users	\$15,000 ¹	\$25,000 ¹	\$99,000 ¹

- ¹One-time setup fee
- Modifications after initial setup - \$500 per change request
- Each professional must have a seat license (see current pricing on our website)
- Requires 24-month license commitment
- ²Personalized Mobile Application can be added to Tier One or Two - contact for pricing
- ³Personal drafting documents can be added to Tier One or Two - contact for pricing
- Maintenance and modifications are placed into production schedule
- All fees are one-time and non-refundable