Brilliant Directories - page requirements

1. As you go through our document, are there features/enhancements you think we should incorporate for our Professionals?
2. Are there features you have seen that have a high impact on user/visitor or Professionals - that drives greater engagement, retention, sign-ups?
3. Are there any security enhancements that we should purchase from Brilliant Directories?
4. As you go through the document, please indicate which particular feature/request is time-consuming beyond a simple/fast setup. This will allow us to determine whether that's a core requirement, or whether we can launch with a simpler/easier alternative sooner (please suggest alternative), aned then revisit with the enhancement after the initial launch
5. If you see the SideDrawer app, we will have buttons that click directly into the specific professional search page, and that will be pulled into the app. Please consider that when thinking about designing the site.
6. If we had professionals listing on the site from international geographies can we set variable pricing?
7. What type of tracking do you use? Can we set up custom link tracking - how do we tell how many leads we are sending each professional

Security Layer (Mustafa)

<u>Branding:</u>
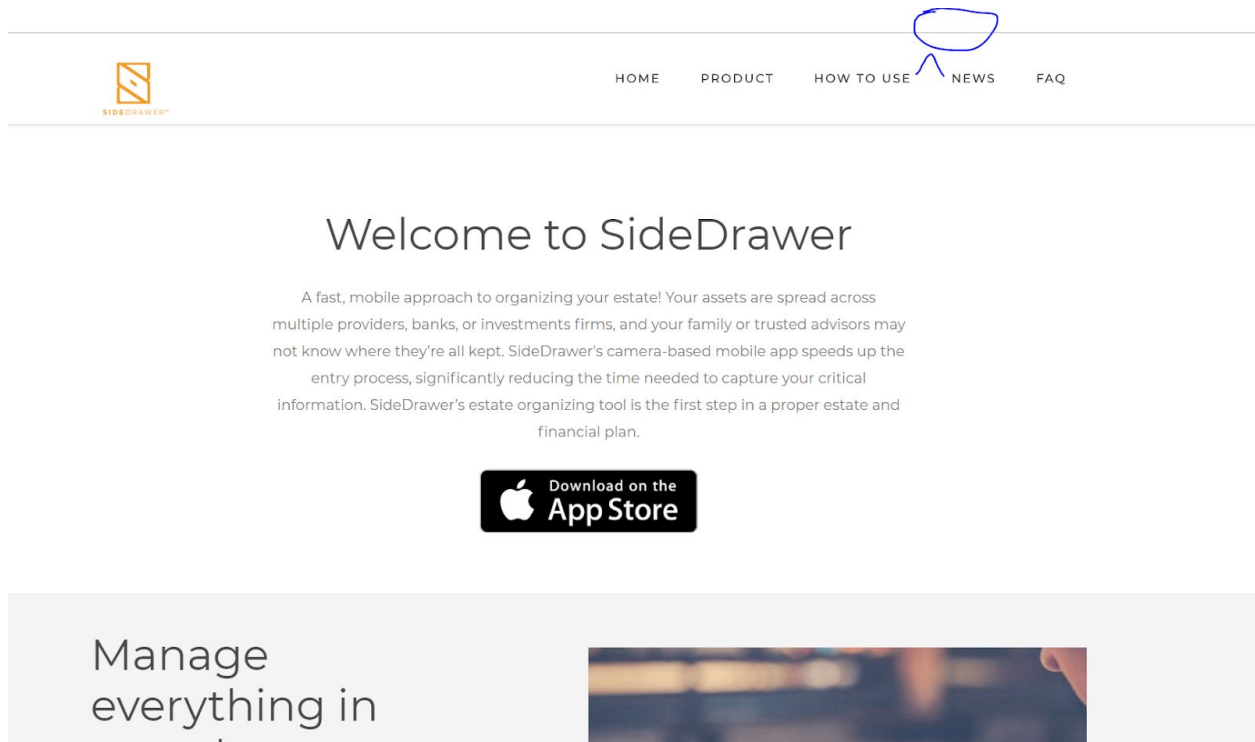
Primary font: Montserrat

Orange color: #EF9926
Blue background: #2F3F56
Purple background: #4E52A3

Logos - in shared folder

Landing Page from SideDrawerApp.com

Will have a button below from the main website that says "Find A Pro"

Welcome to SideDrawer

A fast, mobile approach to organizing your estate! Your assets are spread across multiple providers, banks, or investments firms, and your family or trusted advisors may not know where they're all kept. SideDrawer's camera-based mobile app speeds up the entry process, significantly reducing the time needed to capture your critical information. SideDrawer's estate organizing tool is the first step in a proper estate and financial plan.

Download on the App Store

Manage everything in

When a user clicks on this - they will be redirected to a page that ideally would look like the page below please advise)

Box labels should be:
Estate Lawyers
Insurance Agents
Financial Planners
Accountants
Debt Consultants
Mortgage Brokers

Find a professional to help you organize your estate!

I'm looking for:

Select an option

Search by location:

City or Post Code

Search Now

Lawyers

Mortgage Brokers

Financial Planners

Estate Planners

Asset Managers

Insurance Brokers

Top-rated Professionals

TYPE OF PROFESSIONAL

Name of lawyer

Service 1, Service 2, Service 3

See more lawyers

TYPE OF PROFESSIONAL

Name of lawyer

Service 1, Service 2, Service 3

See more lawyers

ARE YOU A PRO? Join Today

Website Goal

Name

Email

Phone

START FREE DEMO

1. Display SideDrawer logo
2. Leverage the same navigation and footer as the SideDrawerapp.com to keep it consistent.
3. Search box in the center that has a drop down of the professionals to search for and their location
4. If possible - the location field is auto-populated based on the website determining the location of the visitor to the site (ie is visiting from Toronto IP address location has Toronto prepopulated but it can be changed if needed)
5. Banner area has a promo for sidedrawer app and links to Apple Store download link

<u>Join Page</u>

Recommended new:
1) Basic
2) Featured
3) Premium

Sample features:

Post your Ad in Seconds
Searchable Profile
Exposure to SideDrawer App mobile searches
Visible Phone Number - easier to call from mobile phone
Be a SideDrawerPro and get increased exposure and discounts

CTA: Join now

** Need to be able to edit all of the features and pricing for the different levels

Choose a Plan to Join Today
List Your Company In Our Online Directory

Basic	Featured	Premium
Free to Join Get Listed in Seconds	**$9.99 / month** $99.99 / year	**$19.99 / month** $199.99 / year
Searchable Listing	Searchable Listing	Searchable Listing
3rd in Search Results	2nd in Search Results	1st in Search Results
Only 1 Category	Up to 5 Categories	Up to 10 Categories
X	No Ads on Listing	No Ads on Listing
X	Link To Your Website	Link To Your Website
X	Add Phone Number	Add Phone Number
X	X	Receive Reviews
X	X	Publish Events
X	X	Publish Articles
CREATING LISTING	CREATING LISTING	CREATE LISTING

New Professional sign up

1. Information collected:
   a. Professional's name
   b. Business name
   c. Business address
   d. Business phone number
   e. Email address
   f. Website link
   g. LinkedIn link
   h. Company photo
   i. Company's logo
2. About Member - the default page is fine
3. Unique (different for each Professional) - small checkboxes
   a. Estate Lawyer:
      i. Experience level:
         1. Year Professional called to bar: <year entry>
         2.
      ii. Services checkbox:
         1. Estate Planning & Administration
         2. Drafting Primary and Secondary Wills
         3. Estate Trusts

4. Probate
5. Powers of Attorney
6. Obtaining Certificates of Trustees
7. Estate Litigation
8. Pet Wills
b. Life Insurance Agent
    i. Experience level:
        1. Year licensed: <year entry>
    ii. Services checkbox:
        1. LIfe Insurance
        2. Property/Car Insurance
        3. Financial Planner
        4. Financial Advisor
        5. Investment Advisor
        6. Insurance
c. Financial Professional
    i. Experience level:
        1. Year licensed: <year entry>
    ii. Services checkbox:
        1. Financial Planner
        2. Financial Advisor
        3. Investment Advisor
        4. Insurance Products
    iii.
d. Debt Consultant
    i. Experience level:
        1. Year began consultation: <insert year>
    ii. Service checkbox:
        1. Debt consolidation
        2. Consumer Proposal
        3. Bankruptcy
        4. Credit Counseling
    iii.
e. Accountant
    i. Experience level:
        1. Year practice established: <insert year>
    ii. Service checkbox:
        1. Accounting and Bookkeeping
        2. Tax Filing
        3. US Cross Border Tax
        4. Corporate Accounting
        5. Corporate Taxes

4. (Financial Planner and Insurance Agent May have some overlap.so if I search for financial professional but an insurance agent has checked off Financial Planning - can they both show up?)
5. Payment options (we are linked to stripe)
6. Check box - (must be checked to proceed) Agree to terms and conditions (link to terms and conditions)
7. Check box - (must be checked to process) Agree to privacy policy (link to privacy policy)
8. Save and Process payment

Individual Professional page

This default display is perfectly fine
- Don't need "write a review"
- Gold star is associated with premium members
- Instead of 5 star rating can have "Experience Level"Instead of "Send a Message" on the right, can have the floating "SideDrawer app promo" comment from earlier
    - SideDrawer app promo. floating with scrolling ie if user scrolls down the page that promo is always there. Has 2-3 line text "Download the SideDrawer app to organize your estate and share the in-app Comprehensive Report with a Professional. This improves the planning process, reduces fees and saves time." Have link to Apple store.
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About Member - default page with map, address, click to show phone number, email address is fine

Search results page (all should be similar)

1. Professional's details to display:
    a. Individual name, company name, address, map, distance/proximity
    b. Experience level:
        i. Year licensed / Year called to bar:
    c. Phone number which can be dialled (is there a way to track whether a visitor clicked to see phone number as an upcharge opportunity?)
    d. Email address which can be emailed from default mail program (is there a way to track whether a visitor clicked on email as an upcharge opportunity?)
    e. Display the services checkboxes defined later.

2. Featured listing - upcharge
3. Ad banner on left?
4. Right side - SideDrawer app promo. floating with scrolling ie if user scrolls down the page that promo is always there. Has 2-3 line text "Download the SideDrawer app to organize your estate and share the in-app Comprehensive Report with a Professional. This improves the planning process, reduces fees and saves time." Have link to Apple store.

5. Ability to have more than one type of professional displayed. Ie Lawyer AND Financial Planner?

Contact professional page

1. This page opens when user clicks on email to contact the professional
2. From: name.
3. From. Email address.
4. Best way to contact me:
   a. Phone. Ask for number.
   b. Email.
5. To email - autopopulated with professionals email address
6. Subject - drop down selection
   a. General inquiry
   b. Need help with a situation
   c. Preparing to plan
   d. (Final email sent will have subject:
      i. SideDrawer Contact - <dropdown selection>
7. Service selection - based on the checkbox of services that were checked off by the professional - those same options should show here and the user can check off those services as well (For example. If lawyer offers Powers of Attorney - then that box shows up UNchecked and the user can check it off indicating this is what he needs help with. If Powers Of Attorney was NOT checked off by the estate lawyer then that option doesn't show up in this contact form)
8. Checkbox option - "I am a SideDrawer App user. Check this to inform the Professional so they know you want to be efficient with their time. Click here to learn why." - click to sidedrawer pro benefits page - will be on sidedrawerapp.com. We will make.
9. Message entry field
10. Send yourself a copy? Checkbox - require email entry. If yes then send to user.
11. Subscribe to SideDrawer newsletter? Checkbox. Then. Subscribe to newsletter.
12. Send button