Hi Jacob,

Please accept changes and save a V3. Then Could you rewrite market section with track changes on – look for comment with your name. Could you complete this by noon Wednesday.

Hi Connor,

Please update budget based on comments. Could you complete this by noon Wednesday.

Hi Will and Veronica,

Could you do a full review of the document on Wednesday PM.

Thanks,

Mike

From: Connor Hausmann <chausmann@rdpartners.com>
Sent: July 4, 2022 5:01 PM
To: Mike Lee <mlee@fundica.com>; William Croke-Martin <Will@fundica.com>; Veronica Campbell <Vcampbell@rdpartners.com>
Cc: Jacob Ma <Jacob@fundica.com>
Subject: RE: Canexport/Event Research update

Hi all,

Thank you for your patience, I ended up quite busy closing out 6 and 18-month for RDP clients last week and was not able to get this done sooner.

Attached is the first draft of responses to the CanExport application questions (document is also available in SharePoint in the Grants and Other Applications folder in CanExport → Second application (2022)). To help streamline the review, the vast majority of my questions/comments are contained in-line within the document. @Mike Most of these will be for you to review, with some internal comments for my own reference.

Some higher-level points to highlight for this first draft:

1. Budgeting
   a. Events
      i. For now, I have only included events that have officially been researched

and approved. ==Looks good. Added the AZ Fintech Council.==

== ==   ii.   All quotes in the initial version of the budget <u>is for one person</u>. If a second person will also be joining for these trips, let me know and I will update the budget accordingly. ==Make it two people for all booth events.==

    b. Other expenses: Are there any other expenses (ex: registering the Fundica trademark, advertising/translating on social media) that will be relevant for this application, or should we focus on the trade shows? ==See comments.==

        i. If we would like to include any of these expenses in this FY's CanExport budget, we also will also want to confirm all the quotes from the prior application or update accordingly

2. Exporting History: @Mike can you confirm the export sales for both the southern and western US for FY2021 (in CAD)? ==$0k for FY2021 and $0 for FY2022. $297/month for SBA direct in June, one time fee of $5000USD from Novae, no invoice yet for SBDC.== Only you can update this section of the CanExport application on the NRC portal, and I do not have access to this information. ==I will updated at the end==

3. Let's make sure that all numbers we provide related to Fundica and the database are accurate and up-to-date. I have added comments related to key details and figures to confirm within the Word doc. ==Updated.==

With these notes in mind, here are my general thoughts on next steps:

- Will / Jacob: Provide updates on the events budget once/if available (aim is for next week). ==Looks good, but another review needed by Will/Jacob. Added AZ Fintech Council==

- Mike / Connor: Review my questions/comments in the Word doc and respond in-line/update as required. I would also be happy to schedule a sync up to run through these together if that is easier or more efficient for you. ==Done. Remaining comments requiring responses still in doc.==

- Veronica / Connor: Work on second iteration together once Mike has had the chance to review and respond to my questions/comments. In particular, we will have some work to do together on the highlighted chunks to ensure that we have enough detail and clarity to get the application approved by NRC. ==Looks good, but entire doc could be improved and tightened up.==

Let me know your thoughts on the next steps outlined above. I also am available to answer any questions.

Thanks,

Connor

Subject: RE: Canexport/Event Research update

Hi Will,

Looks good. The next big step is getting a great draft together within the format and guidelines they are looking for. They can disqualify an application easily.

Thanks!

Mike

From:
Sent: June 29, 2022 1:29 PM
To:
Cc:

Subject: Canexport/Event Research update

Hi Mike,

A few updates on Events and Canexport are below. Let me know if you have any questions.

- Event Research
  - [Link to document](#)
  - I've added some research points to events you suggested/I found. These events that have not been fully approved are as follows:
    - SBDC 43rd Annual Conference
      - Boston Fintech Week
      - Small Biz Banking
      - CUNA Lending Council Conference
      - Future Digital Finance
  - Next Monday I'll see if [@Jacob](#) is able to find any more info or has any suggestions/comments. I'd appreciate your thoughts on the info I have found for the CUNA and SBDC events in particular, as I'm unsure if it's the best fit for various reasons. [@Jacob](#), I'd appreciate your insight too!
- Event Budgeting
  - [Link to Spreadsheet](#) (this has been moved on sharepoint to Marketing/Grants/Canexport/Second Application, alongside screenshots of the price quotes I collected)
  - The budget is complete, save for the ticket costs of attending Boston Fintech Week (unable to contact them yet).
  - Some events may be removed depending on your/Jacob's thoughts on the events that aren't approved yet.

- Canexport
  - I met with Connor and Veronica to discuss the writing process, the hope is to start today and to have a draft finished this week. Last year's application answers will be used as a jumping-off point. Once @Connor creates a document for the draft, a link can be shared as a followup to this email.

    Thanks,

    Will