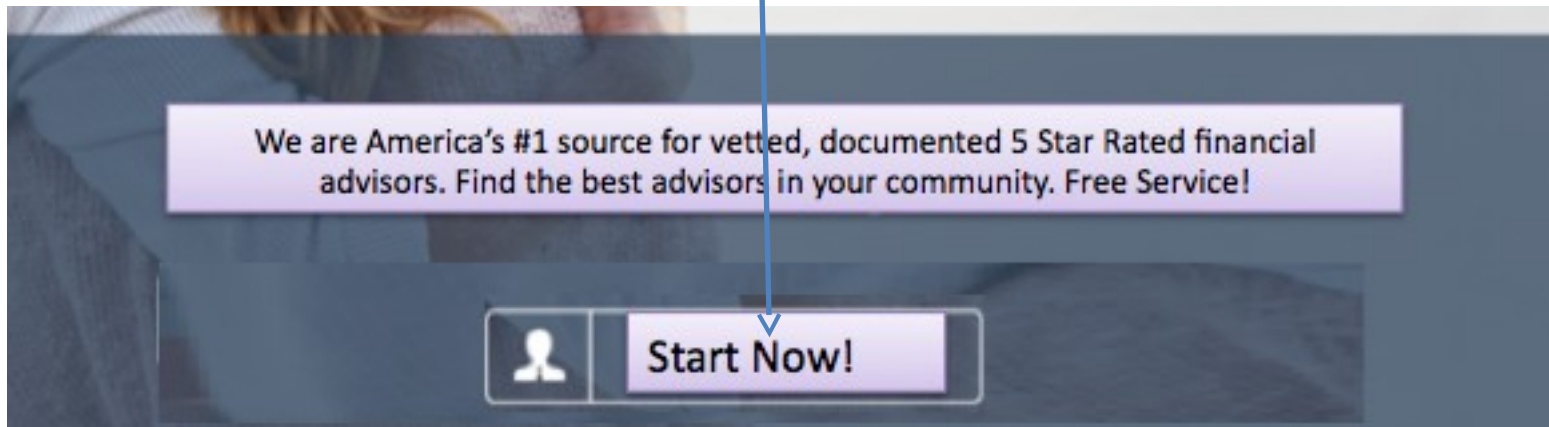


Tamik: The next two slides present a new redesign to this current page:

<https://www.paladinregistry.com/find/how-it-works>

There will be no side navigation on the page given the layout needs.

The new CTA above the fold on the home page will take users to this page





We connect you to pre-screened 5 Star rated financial advisors in your community. Our FREE financial advisor screening and selection process:

- Documents advisor strengths & weaknesses
- Identifies the best advisors at the best firms
- Helps you select a real financial expert
- Helps you avoid salespeople who make false claims



5 Star Match

Tell us your requirements. We match you to a limited number of 5 Star professionals in your community who meet your requirements.

Get Started

These are the icon themes that jack would like for each box



Zip Code Search

Input your zip code and conduct your own search. No registration. Complete privacy. You select the advisors you want to talk to.

Enter ZIP

Find



5 Star Match Service- How it Works

Selecting your first advisor? Had a bad experience with a previous advisor? Want to make sure the advisor meets your specific requirements?

Answer four quick questions. We match you to *5 Star* Rated experts in your community.

- You save time; We search the Registry for you
- Our search is based on your requirements
- Advisor profiles document their credentials, ethics, and practices
- Submit a search request in the AM. Read email results in the PM
- Email results contain advisor's profiles

Zip Code Search- How it Works

Want to control the search process with complete privacy? All you enter is your Zip Code. Our online interactive process does the rest.

- No registration required; all you input is your Zip Code
- Use our Compare Advisors feature for side-by-side comparisons
- Complete privacy until you initiate contact
- You control the search process
- You select who you want to talk to

Tamik: These two boxes contain the text for the Learn More icon under the 5 Star Match and Zip Code search boxes on the previous slide.

Tamik: We went to redo the Contact form as shown here.

Contact Leonard Simpson



I would like this financial expert to contact me by email. I understand there is no fee or obligation for this contact.

I would like to schedule an appointment.
I would like to learn more about your services.

First Name

Last Name

Email Address

Comments: (Communicate additional requirements to the advisor. Provide your phone number if you want the advisor to call you)



Leonard Simpson

916.989.3295

Send Email

We respect your privacy. View our strict [Privacy Policy](#).

By using free Paladin services you are agreeing to be bound by Paladin's [Terms of Service](#).

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Leonard Simpson
916.989.3295

Send Email

Tamik: We will also need to update the associated email that goes to the advisor when someone fills out the Contact form. Please update the fields that appear, including any Comments that are added.

Tamik: I would also like the system to update the advisor's **My Matches** page any time they get an email Contact request from the Contact form.

Investor Match Report for: Wayne Zussman

Use this page to view your investor matches. Simply click on the investor name to view more information about the match. You can also search for archived matches from prior years. Select the prior year from the drop down menu and your data will be displayed.

If you have specific questions regarding your matches, contact us at matches@paladinregistry.com.

Investor Name	Match Date
John Dwyer	05/04/2013
raj richardson	05/15/2013
william seamon	05/15/2013
Joe Thompson	05/28/2013

Debbie Test
10/17/2013

Investor data from the Contact form would populate on the list and in detail. Remove Zip Code, Phone, Asset Range, Services since the Contact form doesn't include those fields.

Investor Information

- Received On: **10/02/2013**
- First Name: **April**
- Last Name: **Brundidge**
- Email: **brundidgea@mail.nih.gov**
- Zip Code: **20603**
- Phone: **(301) 443-5407**
- Asset Range: **\$100,000 to \$250,000**
- Services: **Financial Planning Advice & Services, Tax Advice & Services**
- Comments: