

Instructions for WL 1 builds

We are very excited to partner with you and build out your white label implementation!

The more up-front information that you can provide in this form, the faster we can get you to market.

Process

1) Intake	Complete all sections of this intake form-- please do not hesitate to ask us for advice or clarifying questions
2) Build	We use this information to build your custom technology implementation
3) Testing	We will provide access credentials and allow you to become familiar with the implementation before go-live
4) Go-Live	You've got what you need to start processing orders!

A. Company & Branding

Company Name: Hybrid Funding

**Please fill in the name of your firm as it will appear on your website and correspondence*

Company Website: HybridFunding.co

Final SVG formatted LOGO SENT? Check Box after Logo files shared with FPFx Tech - please

Brand Hex Colors:

Primary Hex Color: #0B4A6F - Logo & CTAs

Background Hex Color: #1BB9A8 - Highlights

Hex Color

Soft Background

Hex Color Header/Title #1B1B1B

B. Plans & Workflows

1 Step Plan Information:

Note: Please leave this section if not offering 1 Phase Plans

	Acct Size	Min Suggested Retail Pricing*	Check if offered	Price
Example	\$10,000	\$85.00	X	\$110
	\$5,000	\$42.50	X	\$48
	\$10,000	\$85.00	X	\$88
	\$25,000	\$212.50	X	\$228
	\$50,000	\$425.00	X	\$428
	\$100,000	\$850.00	X	\$888
	\$200,000	\$1,700.00	X	\$1,788
	\$250,000	\$2,125.00	X	\$2,128
	\$500,000	\$4,887.50	X	\$4,888
Add'l account sizes	\$1,000,000	\$8,500.00		\$8,888
Add'l account sizes				

Questions

go-live

ence

ase do not send until finalized

round #F5F7FA

*Clients may elect to offer pricing below the "Minimum Suggested Retail Pricing", but in no case shall the Technology Provider be less than 70% of MSRP listed above

2 Step Plan Information:

Note: Please leave this section if not offering 2 Phase Plans

	Acct Size	Min Suggested Retail Pricing*	Check if offered	Price
Example	\$10,000	\$110.00	X	\$130
	\$5,000	\$60.00	X	\$68
	\$10,000	\$110.00	X	\$118
	\$25,000	\$250.00	X	\$258
	\$50,000	\$345.00	X	\$368
	\$100,000	\$525.00	X	\$588
	\$200,000	\$1,000.00	X	\$1,088
	\$250,000	\$1,225.00	X	\$1,288
	\$500,000	\$2,760.00	X	\$2,888
Add'l account sizes	\$1,000,000	\$4,750.00		\$4,888
Add'l account sizes				

*Clients may elect to offer pricing below the "Minimum Suggested Retail Pricing", but in no case shall the Technology Provider be less than 70% of MSRP listed above

3 Step Plan Information:

Note: Please leave this section if not offering 3 Phase Plans

	Acct Size	Min Suggested Retail Pricing*	Check if offered	Price
Example	\$10,000	\$77.00	X	\$130
	\$5,000	\$42.00	X	\$48
	\$10,000	\$77.00	X	\$78
	\$25,000	\$175.00	X	\$188
	\$50,000	\$241.50	X	\$248
	\$100,000	\$367.50	X	\$388
	\$200,000	\$700.00	X	\$788
	\$250,000	\$857.50	X	\$888
	\$500,000	\$1,932.00	X	\$1,988
Add'l account sizes	\$1,000,000	\$3,325.00		\$3,388
Add'l account sizes				

*Clients may elect to offer pricing below the "Minimum Suggested Retail Pricing", but in no case shall the Technology Provider be less than 70% of MSRP listed above

C. Emails

☒ Standard Email Option (We create "yourcompanyname@propaccount.com") :

OR

☐ (Select) Your Email Option (Requires the following):

all the price received

all the price received

all the price received

and share credentials

Email Address:

Email Provider: Primary = SendGrid recommended

Email API Key

Paid Account? Select here to confirm this is a paid plan

You must NEVER use this email for marketing purposes or it

D. Other Setup Questions?

We want the futures plans as well.

\$25,000 - \$288

\$50,000 - \$588

\$100000 - \$1088

\$200000 - \$1788

ed, *Secondary = Postmark recommended*

will get blacklisted