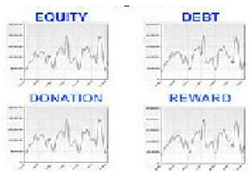
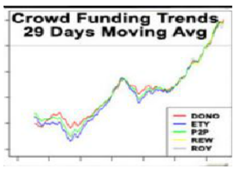
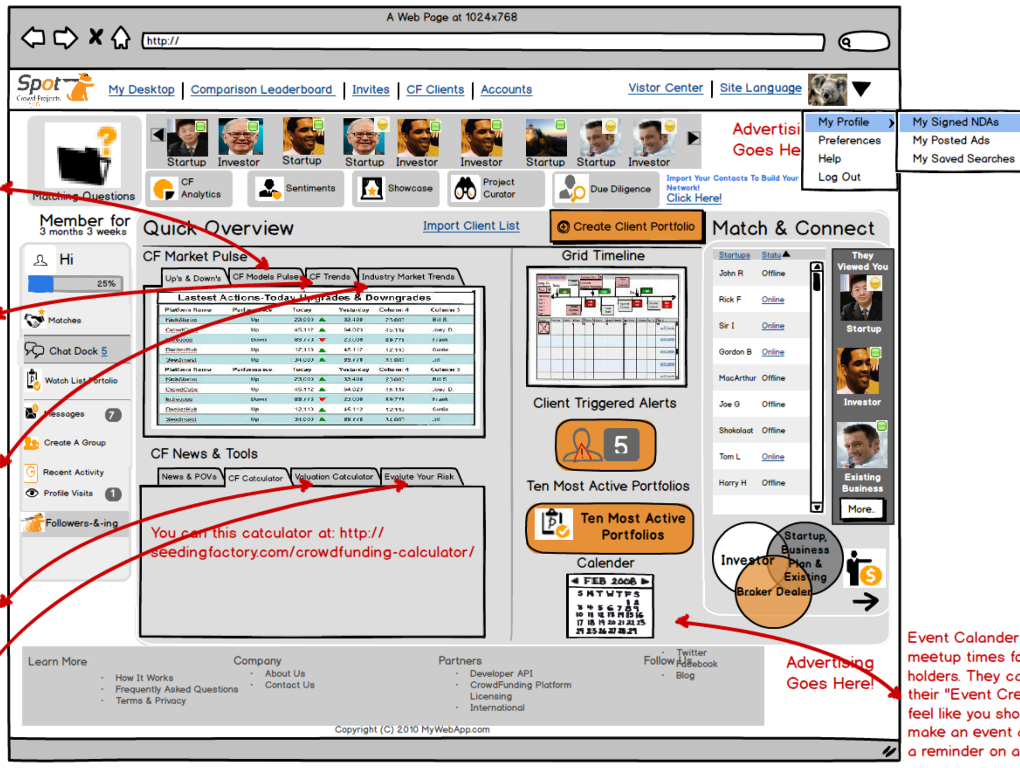
# Broker Dealer Home Page



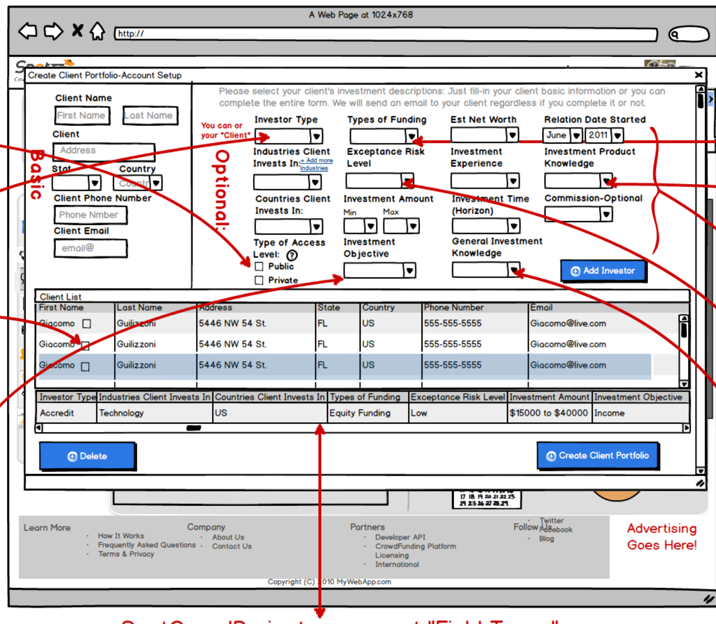

You can this valuation calculator at: https://www.equitynet.com/crowdfunding-tools/startup-valuation-calculator.aspx

You can this risk calculator at: https://www.equitynet.com/crowdfunding-tools/startup-risk-calculator.aspx

Event Calander for scheduling meetup times for any of the 5 Stake holders. They can invite people with their "Event Creation Screen", but I feel like you should have the ablity to make an event and have it show up as a reminder on any page.

# Broker Dealer Home Page

Access:The type of access level assigned to the client:
"Public"
Clients are accessible to any user in your firm authorized to access at least one of the client accounts.
"Private"
Clients are only accessible to the user who created the client and users within the firm who have Admin-level privileges.




My Signed NDAs
My Posted Ads
My Saved Searches

Funding Types:
Equity Funding (VC, Angel,
Loan/Lease Funding,
Commercial Mortgage/
Equipment Financing,
Alternative/Creative
Business Acquisition/
Debt Consolidation,
Operational/Growth
Receivables/Invoice
Merchant Cash Advance,
Secured Loan,
Unsecured Loan

Crowd Funding
Stocks
Bonds
Mutual Funds

Low
Moderate
High

Low
Moderate
High

Novice
Intermediate
Extensive

Accredited Investor
Advisory Firm/Broker
Angel Investors/VC
Asset/Wealth Mangger
Bank/Financial Services
Family Office
Foundations &
Government Entity
Non Accredited Investor
M&A Firm/Corporation
PE Association/Networks
Private Equity Fund
Bank / Financial Services
Family Office
Foundations &
Government Entity
HNWI / Individual Investor
Incubator / Accelerator
Law Firm
Owner of a Firm
PE Firm
Private Equity Fund of Fund
Private Placement Agents

You can only check one box when creating a "Client Portfolio". When you want to delete you can check multple client check boxes.

Capital Appreciation
Preservation of Capital
Income
Speculation
Trading Profits

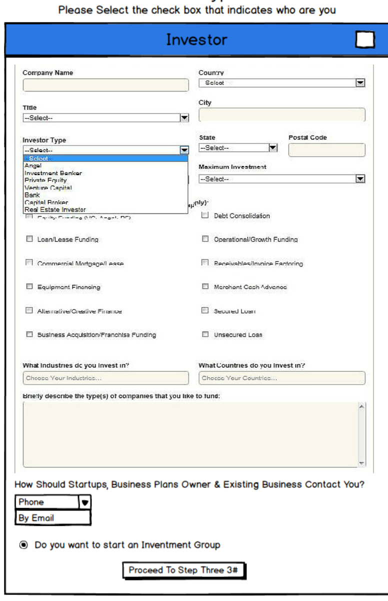
Advertising Goes Here!

## SpotCrowdProjects pernment "Field Types"

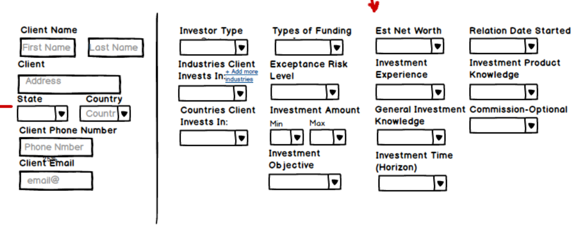
| Investor Type | Industries Client Invests In | Countries Client Invests In | Types of Funding | Exceptance Risk Level | Investment Amount | Investment Objective | Est. Net Worth | Investment Experience | Investment Time (Horizon) | General Investment Knowledge | Relation Date Started | Investment Product Knowledge | Commission |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Accredit | Technology | US | Equity Funding | Low | $15000 to $40000 | Income | 1-3 years | 5 years | 2 years | 2 years | 02/11/2009 | Crowd Funding | 15% |

I accidently made a mistake and left these addtional "Investor Registration" fields out. Please add these input fields to the "Investor Registration" section on the "SpotCrowdProject Registration Process" pdf.... Please note: When an Broker Dealer create a portfolio and fills in the input fields for an investor that information will be auto-populated into the "Investor Registration" fields so when the investor comes to SpotCrowdProject the registration process wil be quick.

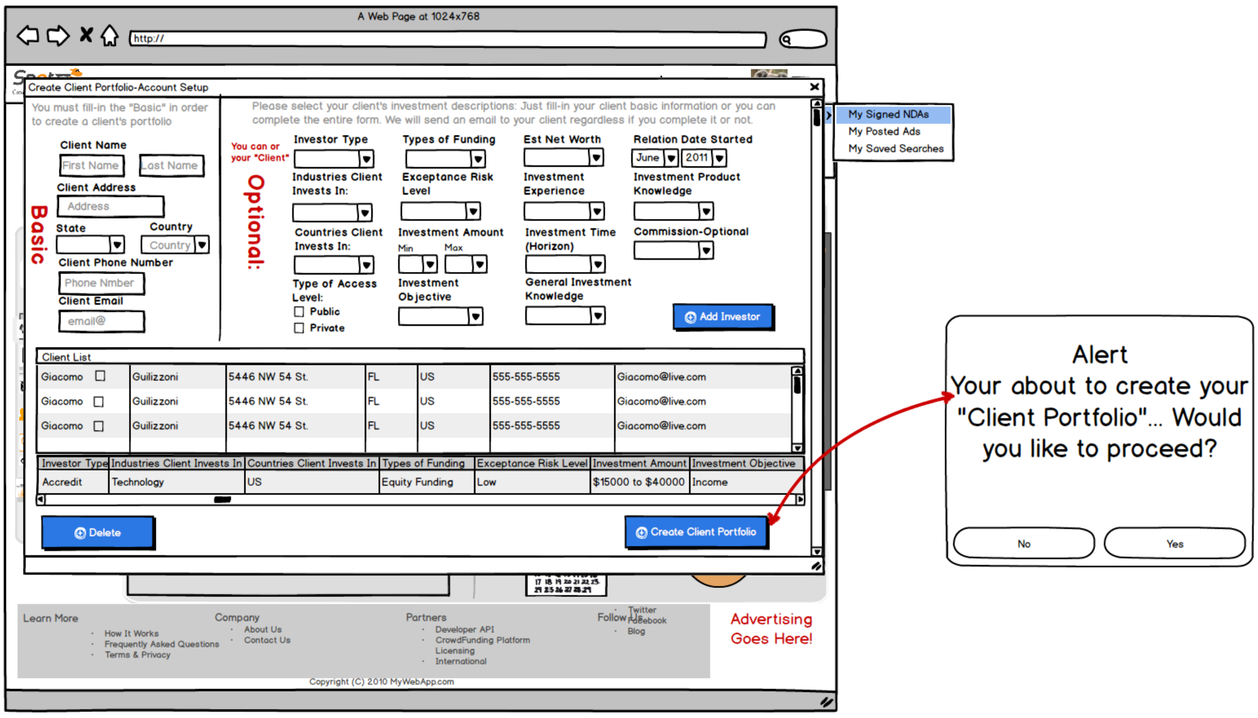
Select User Type
Please Select the check box that indicates who are you



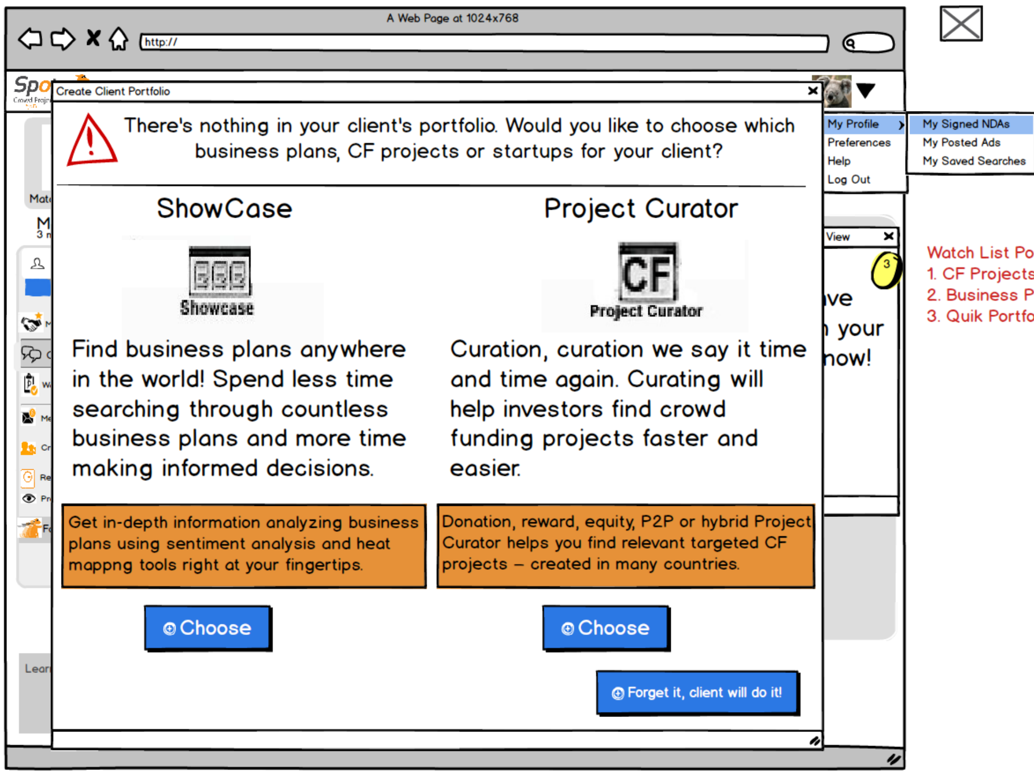

Add these Here



# Broker Dealer Home Page

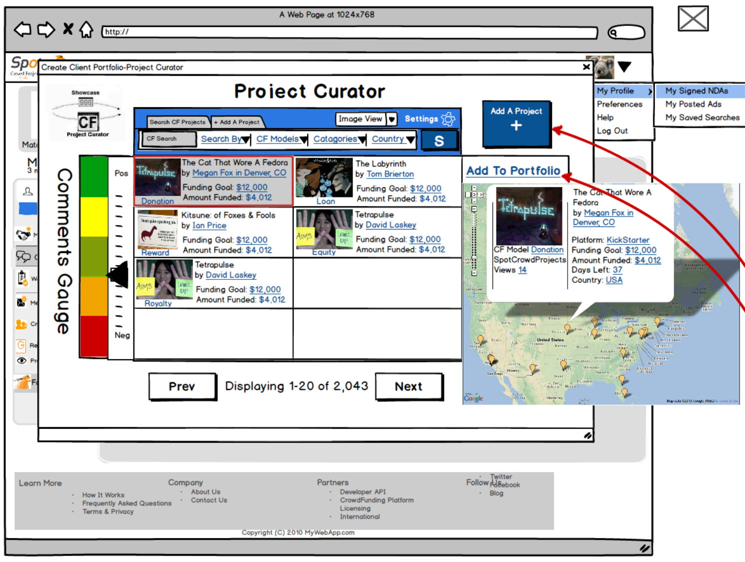


Created Watch List Portfilio for Broker Dealer Client




Watch List Porfilio:
1. CF Projects-Inside portfolio
2. Business Plans-Inside portfolio
3. Quik Portfolio Health View

Created Watch List Portfilio for Broker Dealer Client



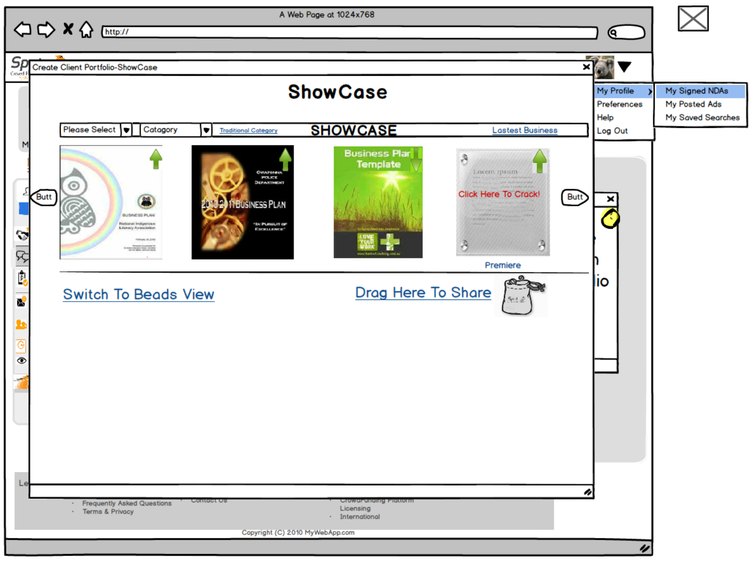

Showcase (Business Plans) and Project Curator (Crowd Funding Projects) Home Page. But keep in mind Showcase (Business Plans) will only allow 2-3 pages of a business plan from the outside of the website which they have to join to see more business plans. Also the Project Curator (formly known as Web Investment Search) users will have the abilitiy to search only 3 CF Projects from the outside after that a user will have to login to view more CF Projects and ADD A Project..

Keep in mind that when a Broker Dealer is creating a "Client's Portfolio" their login.

Keep in mind that the button or tab that's says "Add A Project" that is for adding a CF project to the database, not to a client's portfolio or your portfolio. The "Add To Portfolio" is far importing CF projects into a client's portfolio or your portfolio

Created Watch List Portfilio for Broker Dealer Client

Please note: The ShowCase has a "[Import To Portfolio]" link already. Please review ShowCase wireframes....

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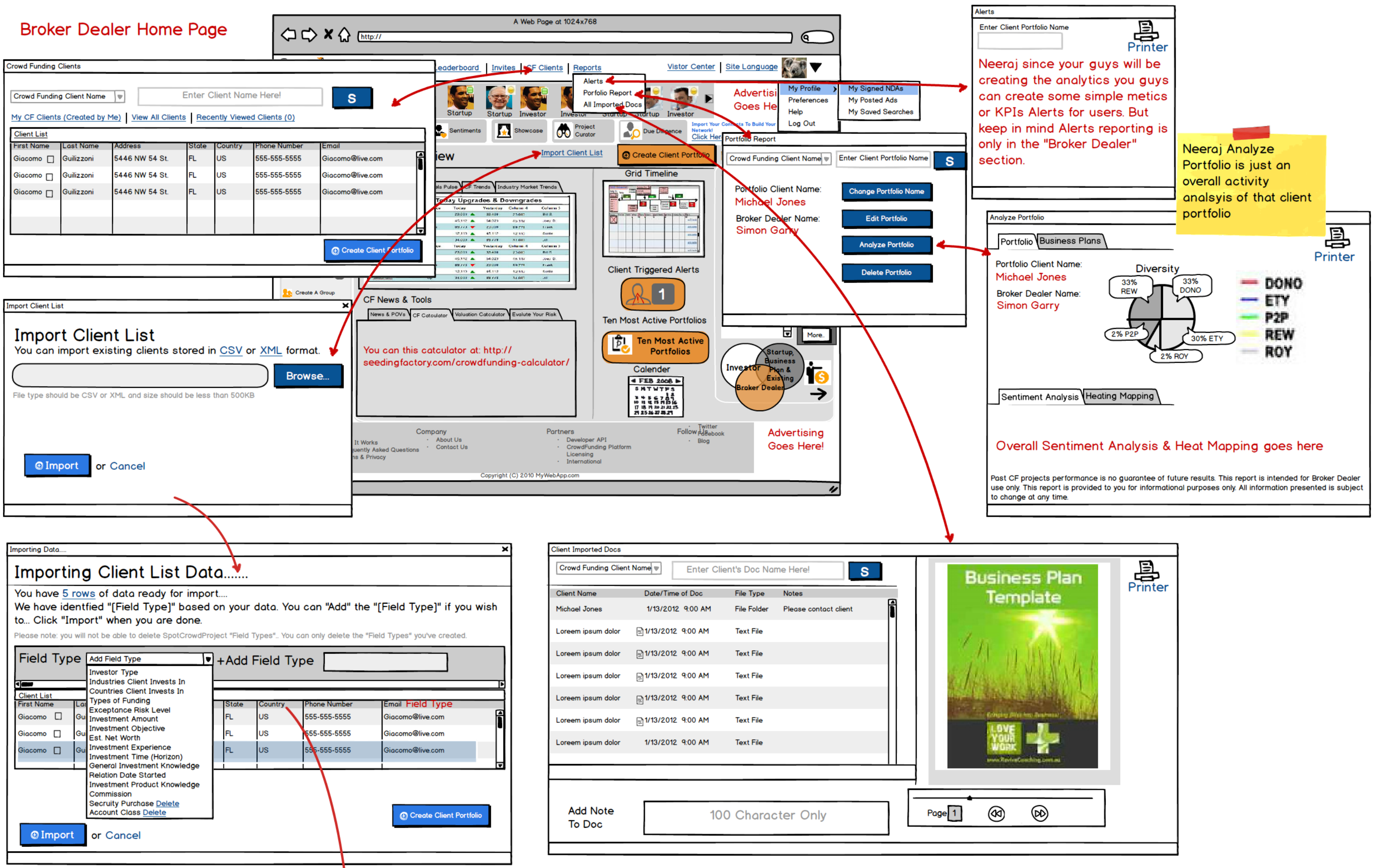


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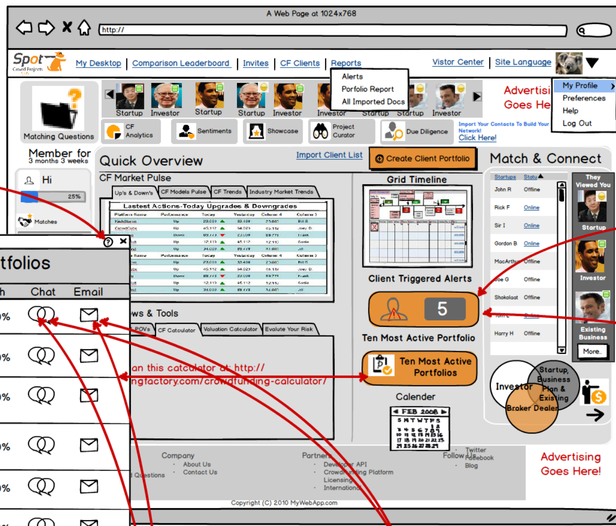
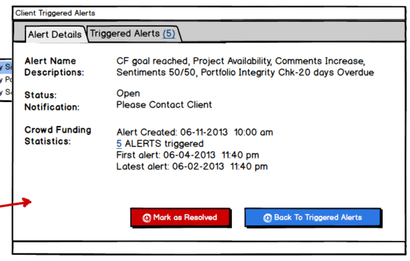
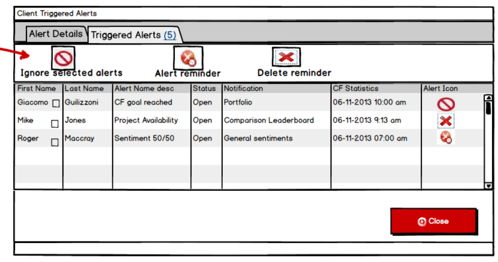
Broker Dealer Home Page

SpotCrowdProjects uses collaboration, charting and news indicators to rate a portfolio activity.







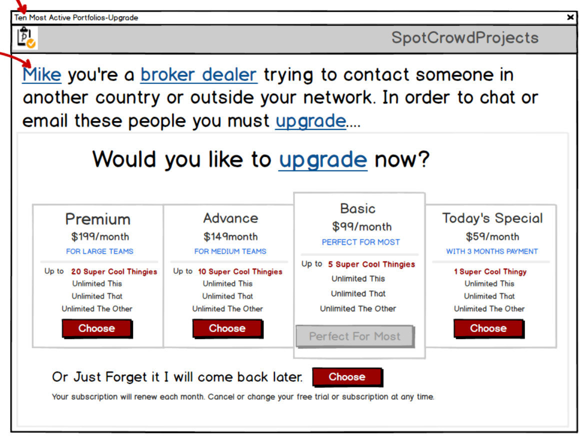




We need to create some more Client Triggered Alerts.

Example of Client Triggered Alerts:

Project Availability
Comments Increase
Crowd funding goal reached
Project Unavailable
Sentiments 50/50
Portfolio Integrity Chk-20 days Overdue

Stakeholder first name and profession name here. But keep the message the same for all stakeholders.




Neeraj, in order to create a criterion for the "Ten Most Active Portfolio" we must use some type of grading or rating. I though we should grade or rate all stakeholders with collaboration, charting and news indicators. This is a simple way to grade a user "Portfolio" without exposing private info, which the user will be concern about.

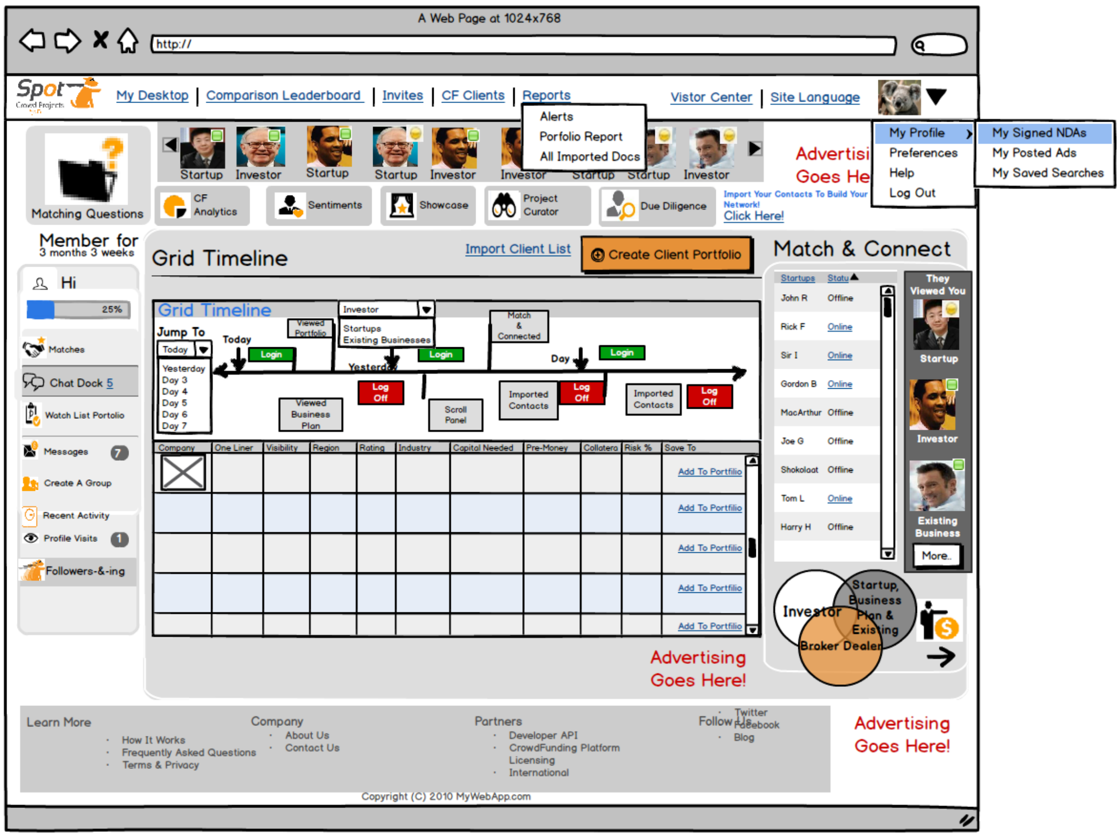
Please note: Each stakeholder can only contact...

Broker Dealer-Contact startups & investors
Investor-Contact startups & broker dealer
Startup-Contact investor & CF platform
CF Platform-Contact startups only
Service Provider-Contact startup only

Note: If a stakeholder try to contact someone matching their target it will be allow. For example: A Broker Dealer can chat or email from the "Ten Most Active Portfolio" in the USA a startup or investor. But if the any stakeholder try to contact any other stakeholder in another country their credit card will be charge.

Neeraj since your guys will be creating the analytics you guys can create some simple metics or KPIs Alerts for users. But keep in mind Alerts reporting is only in the "Broker Dealer" section.

# Broker Dealer Home Page



Watch List Portfilio will be for CF projects and Business Plans

# Broker Dealer Algorithm Questions

2. Have you ever broker a deal between a CF project and investor?
Yes
No

3. Have you ever used a CF platform or portal?
Yes
No

4. If yes which CF sites or portals are you registered under?

5. What are you looking for in brokering a crowdfunding startup? Please check off all that apply
Just Earning Commisson
Getting excess to Crowdfunding platforms
Networking
Emotional toward causes
Just inquisitive about crowdfunding
Other

6. How many times a week on average does you log onto a CF site or portal?
0
1-3
4-7
7+
N/A

7. How many CF sites have you visit in the past?
0
1-3
4-7
7+
N/A

8. What's the longest crowd investing venture you have been in?

Never been involved in an investing venture less than a year?
1-2 years
2-4 years
4-6 years
6-10 years
10 years+

9. Is this your second time brokering crowdfunding?
Yes
No
N/A

10. Do you have an ideal range of when your clients would expect a ROI on their investment?
Yes
No
N/A

11. If yes what is the range of months or years?
N/A

6 months
18 months
24 months
36 months
60 months

12. Have you any deep fears about crowdfunding? If yes, please write a short description below

13. What type of project/IPO/Startup would you broker? Please check all that apply
Technology
Computers
N/A

14. What CF platform or portal do you like best? Please input name in the box

15. How do you spend your free time?
Fishing
Dancing
Theatre
Fine Dining
Yachting
At a Lounge or Bar
Attending Sports games
Watching Television
Going out to eat
Long drives
Crafting
Music/Concerts
Exercising
Other please specify

16. Where and how did you first hear about crowdfunding?

17. Would you rely on CF platform or portal to find you an project match or would you hire a alternative broker dealer to find investments for you?
Yes
Yes, but I rather broker my own investment
No, hire an alternative broker dealer
Undecided

18. Do you have the time to look for a CF site and not know where to find them, or do you not have the time?
Have the time, but do not know where to find them
Do not have the time
N/A
Other please specify

19. Do you like searching the internet for Startups/CF Projects and investors? Or do you find it frustrating?
Like going out finding
I find it frustrating
N/A
Other please specify

20. Would you use more than 1 CF platform?
Yes
No
N/A

21. Do you like CF projects with family & friends loan assistance?
Yes
No

22. Do any CF personal know you as CF Broker Dealer and have a CF site profile?
Yes
No

23. Are you willing to assist a startup with marketing?
Yes
No

24. Do you think it's embarrassing to tell someone that you broker with a CF project?
Yes
No
25. Are you a sincere advocate of crowdfunding and planning on getting others involved with brokering CF projects?
Yes
No

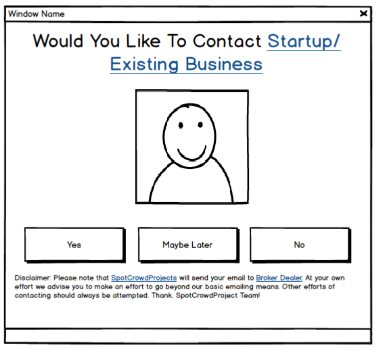
26. If you have a CF online profile how long did you think about it before setting up a profile? If you do not have a CF profile how long you have been thinking about setting up a profile for?
N/A
Explain

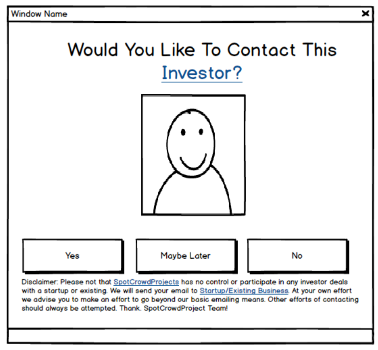
27. Do you know any otherbroker dealer or brokeage firm using an online CF platform or portal currently?
Yes
No
If yes, please name some here

28. Are you a license broker dealer and have experience with brokering CF deals between startups and investors.
Yes
No
If yes, name some CF projects and investors that can vouch for you....

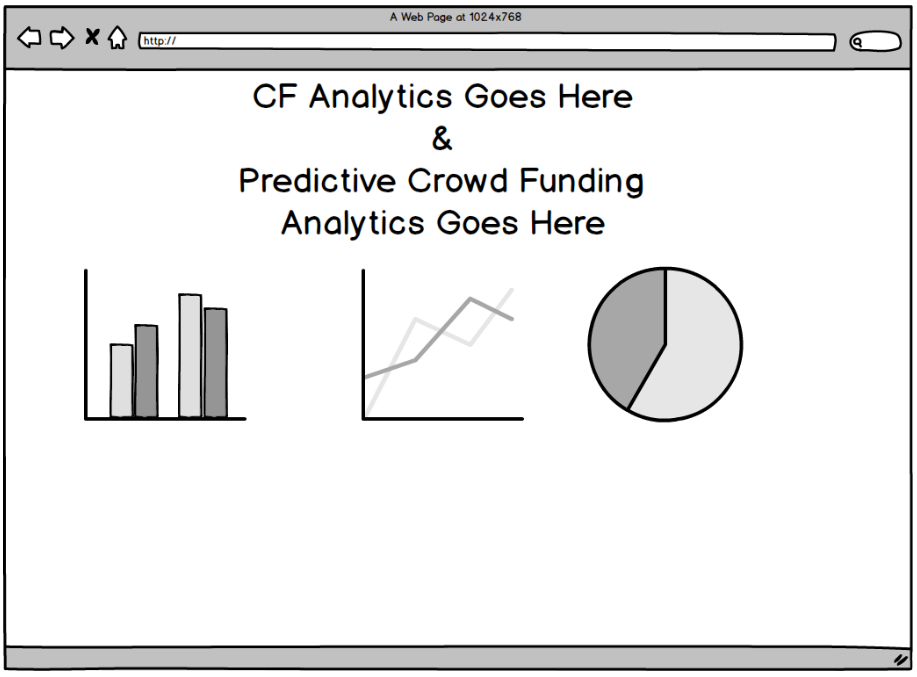
29. Have you ever cancelled a CF profile before, if so what was the reason?

Profile Picture Slider



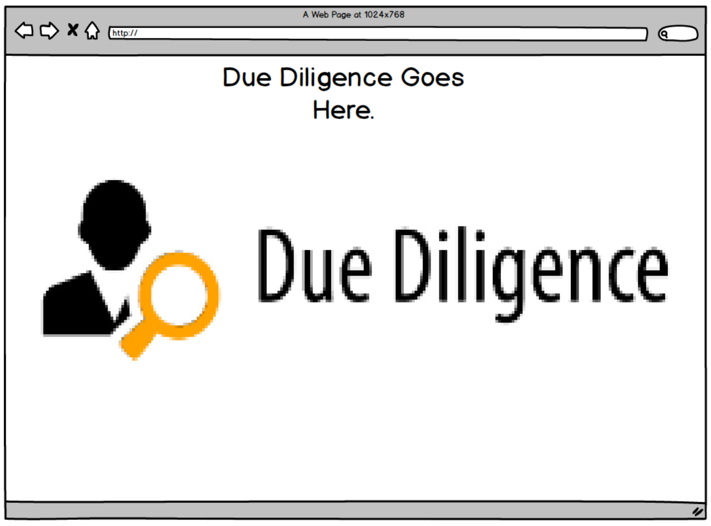




Talking About This



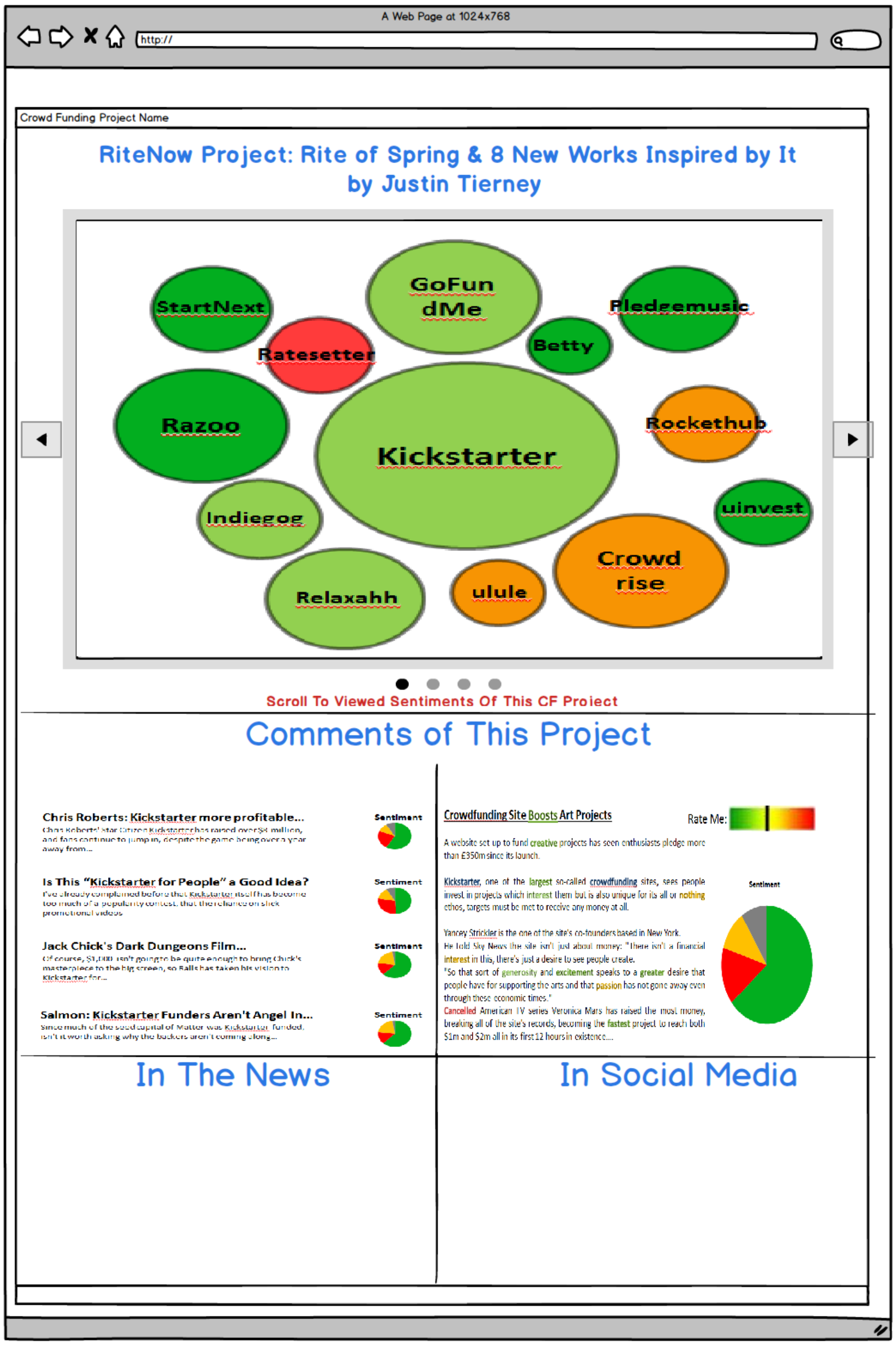

Talking About This

Due Diligence




Talking About This

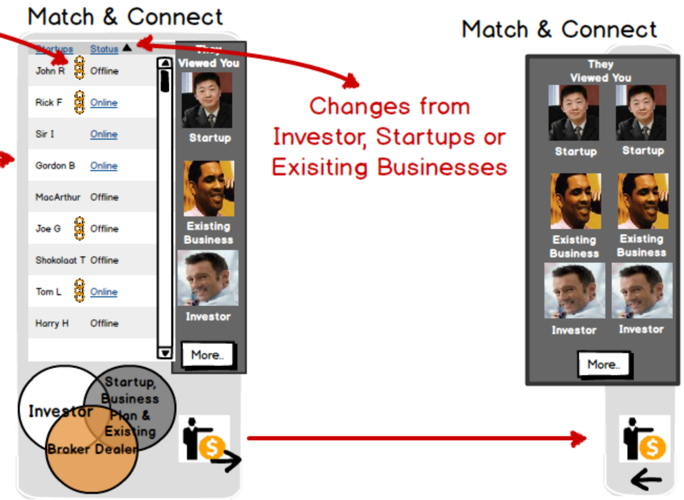
Sentiment Analysis Goes Here
Please look at the charts……



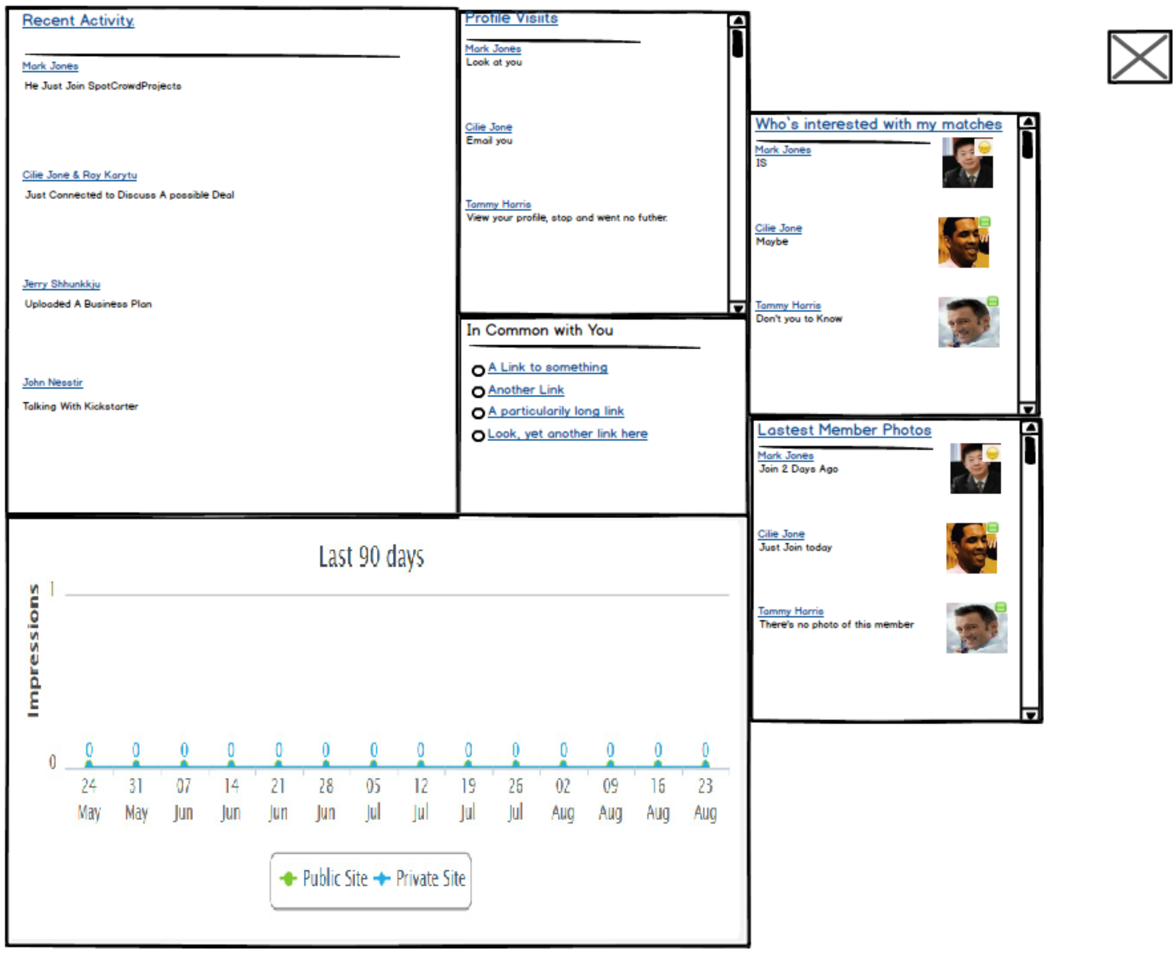
# Match & Connect

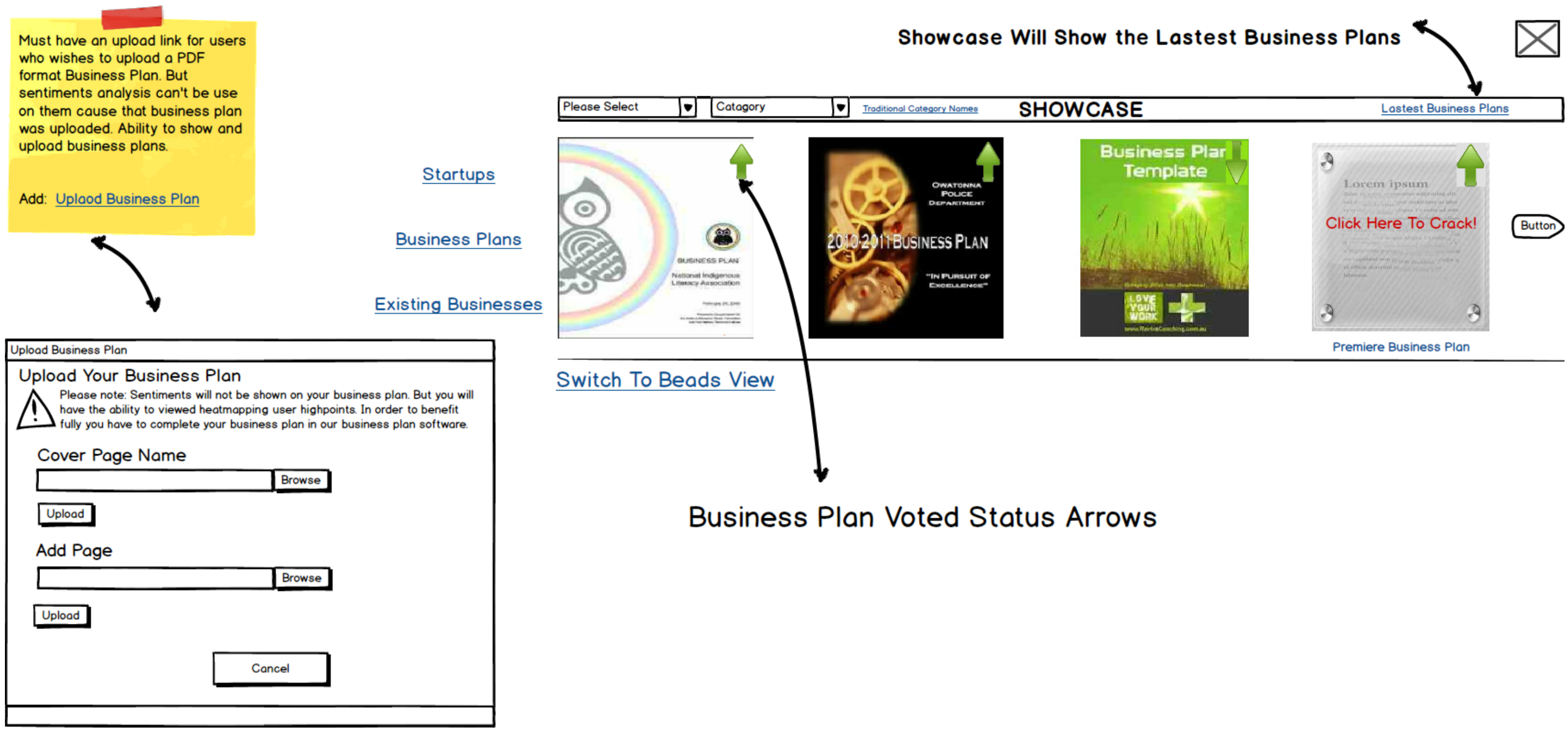
When a Broker Dealer click on the "Chain Link" icon it will keep the Investor, Startup or Exisiting Business current on the Match & Connect bar without being recycle. They will always be current in the Match & Connect scroll bar.

When a Broker Dealer click here on an Startup, Existing Business or Investor a brief Profile Page will appear

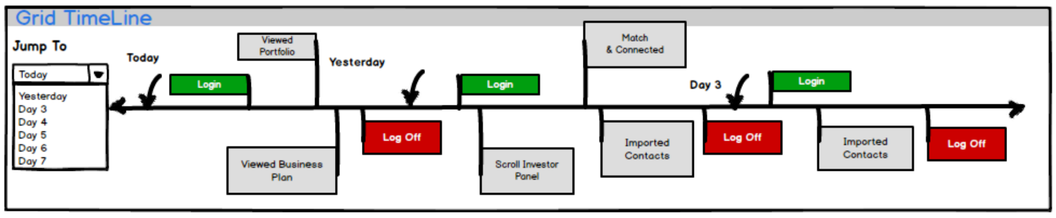


# Recent Activity

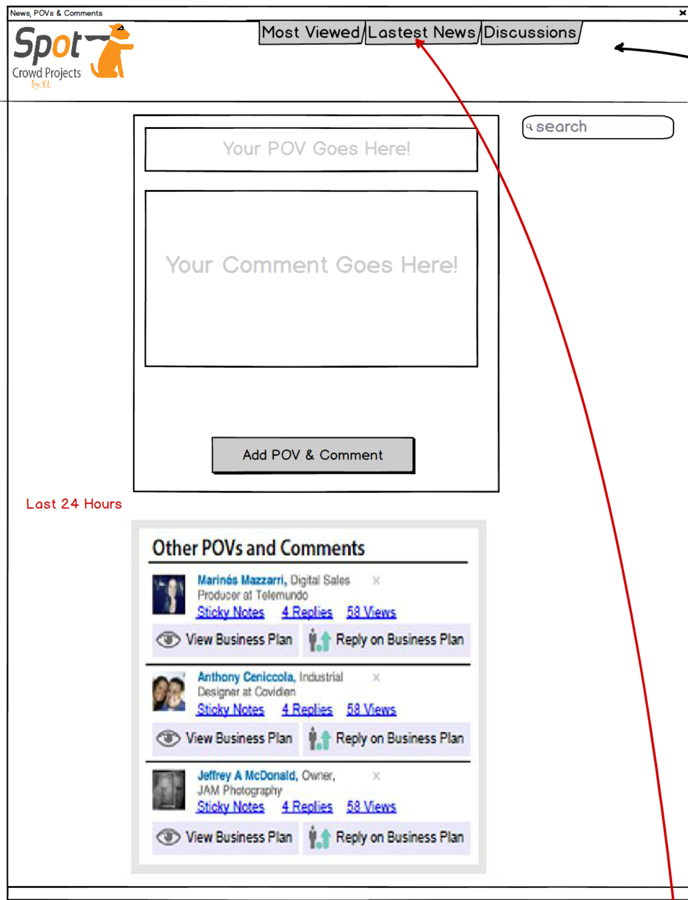



Must have an upload link for users who wishes to upload a PDF format Business Plan. But sentiments analysis can't be use on them cause that business plan was uploaded. Ability to show and upload business plans.
Add: Upload Business Plan
Startups
Business Plans
Existing Businesses
Showcase Will Show the Lastest Business Plans
Please Select
Catogory
Traditional Category Names
SHOWCASE
Lastest Business Plans
BUSINESS PLAN
National Indigenous Literacy Association
OWATONNA POLICE DEPARTMENT
2010-2011 BUSINESS PLAN
"IN PURSUIT OF EXCELLENCE"
Business Plan Template
LOVE YOUR WORK
Lorem ipsum
Click Here To Crack!
Button
Premiere Business Plan
Switch To Beads View
Business Plan Voted Status Arrows
Upload Business Plan
Upload Your Business Plan
Please note: Sentiments will not be shown on your business plan. But you will have the ability to viewed heatmapping user highpoints. In order to benefit fully you have to complete your business plan in our business plan software.
Cover Page Name
Browse
Upload
Add Page
Browse
Upload
Cancel

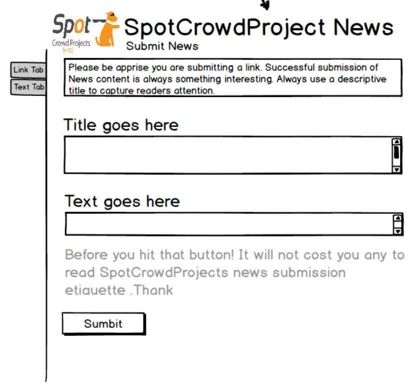
Grid Timeline Window shows a user-target 7 Day timeline activities



News
&
POVs



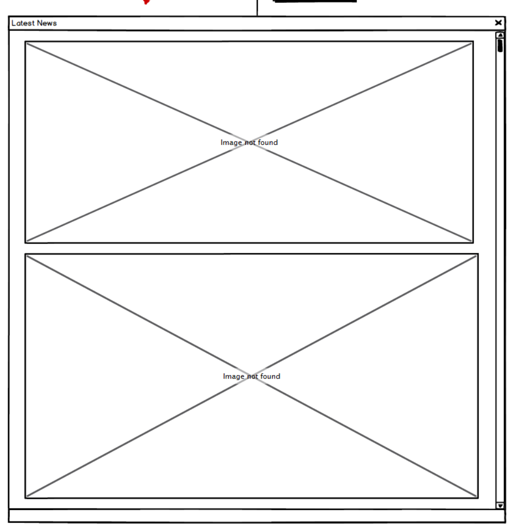






Read this very important.... I spoke to this guy about buying this solution for news. This is not sentiment analysis... Please review solution... It's for news...

Email correspondence
Nadav <nadav256@gmail.com>
Hi EL, I am sorry that I did not get back to you sooner. I don't do consulting; I will try to ask around some of my friends. Yes, you can license the OTS. Basically, you get rights to use OTS and all future versions under BSD. This means that you own the code and can do whatever you want with it (release closed-source products, relicense, resell, etc). The Open Text Summarizer summarizes texts in English, German, Spanish, Russian, Hebrew, Esperanto and other languages. To Support more languages or tweak existing languages can be done by simply editing an XML file of rule Includes English, French, Spanish, Portuguese, and German. Lexalytics exclusively uses Native Language Packs, which catch more nuances in translation, and offer more precise sentiment analysis: we like good results.. http://libots.sourceforge.net/




Just Paste some newspaper acticle in the "Summarizer" and get a highed result.

## Broker Dealer Section Input Fields Investors Startups & Existing Business

## Startup Input Fields

Startups
Existing Businesses
Investors

| Company Logo | One Liner | Visibility | Region | Rating | Industry | Capital Needed | Pre-Money Val | Collateral | Risk % | Save To Portfolio |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | | ★★★★★ | | | | | Low | Add To Portfilio |
| | | | | | | | | | Moderate | Add To Portfilio |
| | | | | | | | | | High | Add To Portfilio |

Visibility:
Private
Public

Rating:
★☆☆☆☆
★★☆☆☆
★★★☆☆
★★★★☆
★★★★★

Industry:
Accounting
Advertising/Marketing
Aerospace/Defense
Agriculture/Forestry
Arts/Entertainment/Music
Automotive
Biotechnology/Pharmaceuticals
Business Services
Chemicals
Computers/Peripherals
Construction/Maintenance
Education/Training
Electronics/Electrical
Employment
Energy
Environment
Financial Services
Food/Related Products
Healthcare
Hospitality
Human Resources
Industrial Goods/Services
Information Technology
International Business/Trade
Materials/Consumer Goods
Mining/Drilling
Office Equipment/Supplies
Publishing/Printing
Real Estate
Restaurants
Retail Trade
Security
Software
Telecommunications
Textiles/Clothing
Transportation/Logistics
Travel

Capital Needed:
$500
$1000
$2000
$3000
$10000
$100000

Collateral:
Yes
No

Risk %:
Low
Moderate
High

## Investor Input Field

Investors
Startups
Existing Businesses

| Company Logo | Verified | Investor Type | Region | Target Investment Range | Industry | Types of Funding | Save To Portfolio |
|---|---|---|---|---|---|---|---|
| | | | | | | Low | Add To Portfilio |
| | | | | | | Moderate | Add To Portfilio |
| | | | | | | High | Add To Portfilio |

Verified:
Yes
No

Investor Type:
Accredited Investor
Advisory Firm/Broker
Angel Investors/VC
Asset/Wealth Mangger
Bank/Financial Services
Family Office
Foundations &
Government Entity
Non Accredited Investor
M&A Firm/Corporation
PE Association/Networks
Private Equity Fund
Bank / Financial Services
Family Office
Foundations &
Government Entity
HNWI / Individual Investor
Incubator / Accelerator
Low Firm
Owner of a Firm
PE Firm
Private Equity Fund of Fund
Private Placement Agents

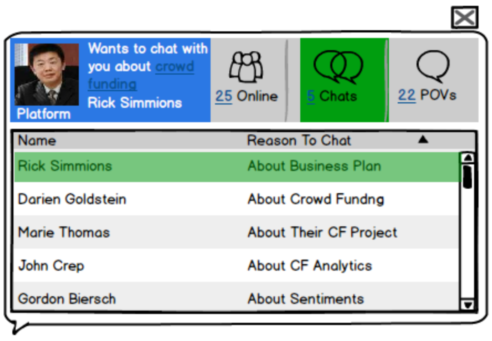
Target Investment Range:
$500
$1000
$2000
$3000
$10000
$100000

Industry:
Accounting
Advertising/Marketing
Aerospace/Defense
Agriculture/Forestry
Arts/Entertainment/Music
Automotive
Biotechnology/Pharmaceutic
Business Services
Chemicals
Computers/Peripherals
Construction/Maintenance
Education/Training
Electronics/Electrical
Employment
Energy
Environment
Financial Services
Food/Related Products
Healthcare
Hospitality
Human Resources
Industrial Goods/Services
Information Technology
International Business/Trade
Materials/Consumer Goods
Mining/Drilling
Office Equipment/Supplies
Publishing/Printing
Real Estate
Restaurants
Retail Trade
Security
Software
Telecommunications
Textiles/Clothing
Transportation/Logistics
Travel

Types of Funding:
Funding Types:
Equity Funding (VC, Angel,
Loan/Lease Funding,
Commercial Mortgage/
Equipment Financing,
Alternative/Creative
Business Acquisition/
Debt Consolidation,
Operational/Growth
Receivables/Invoice
Merchant Cash Advance,
Secured Loan,
Unsecured Loan

Low
Moderate
High

# Chat Dock




Wants to chat with you about Business Plan

Wants to chat with you about their CF Project

Wants to chat with you about Investment Group

Wants to chat with you about Due Diligence

Wants to chat with you about Crowd Funding

Wants to chat with you about Sentiments

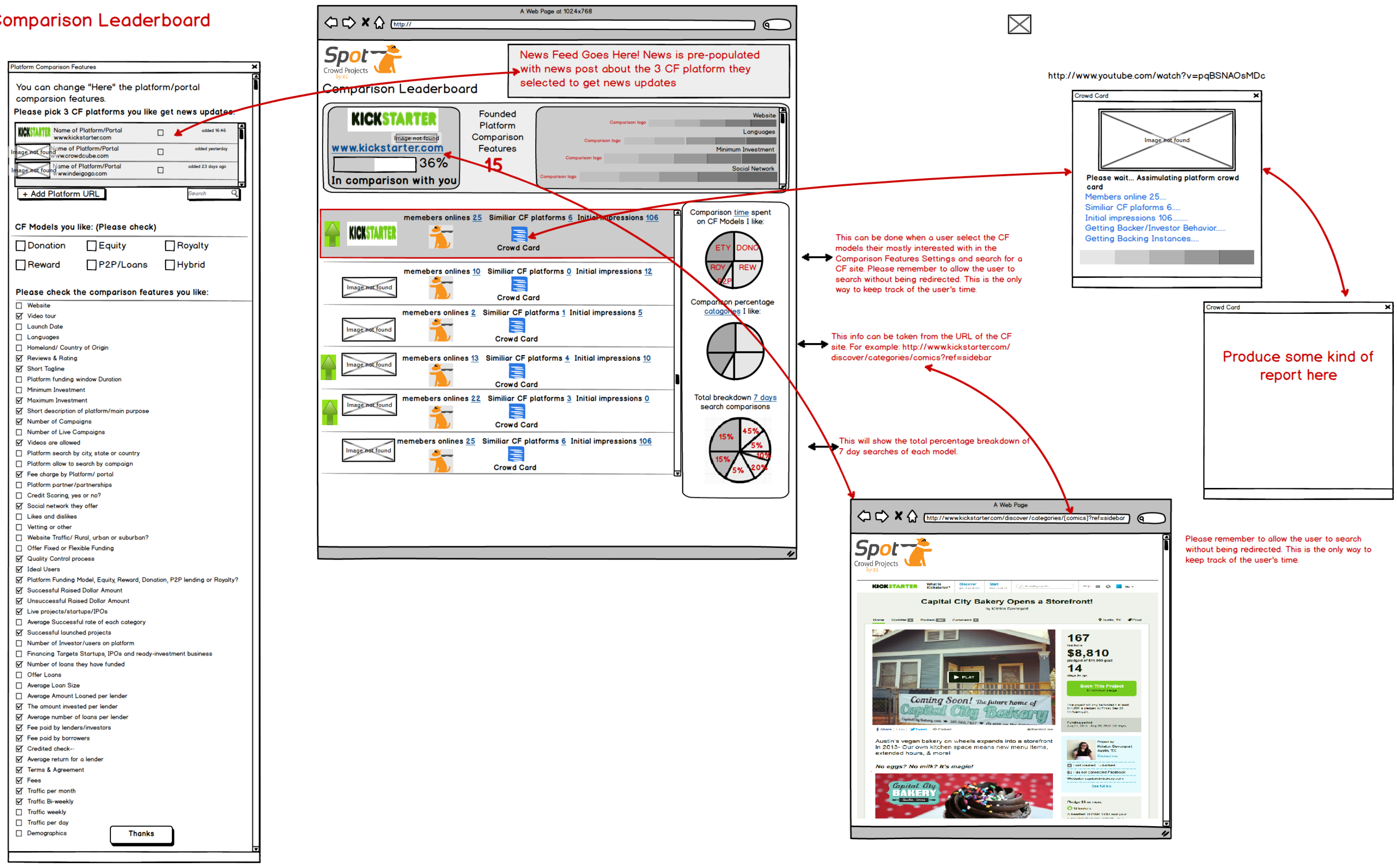
Wants to chat with you about CF Analytics

Wants to chat with you Broker Dealer

Wants to chat with you about their Business Plan

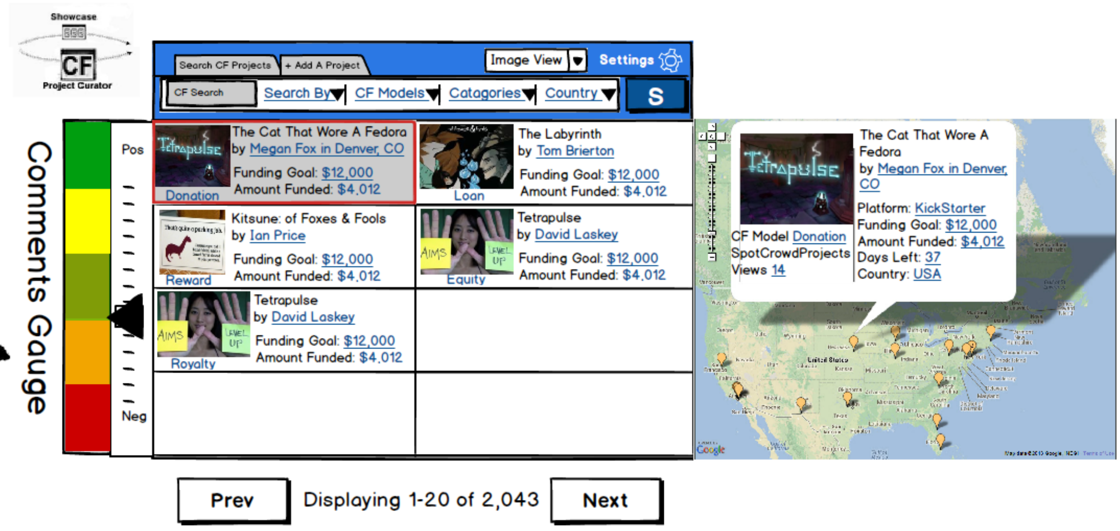
Developers has to create more system pre-program chat messages.

# Comparison Leaderboard



Toggle Search Icon switch from the Showcase (Business Plans) to Project Curator (Crowd Funding Projects

Quik Project Sentiment & Comment Gauge



Matches & Who's Interested In My Matches