

iMessage
6/25/17, 4:29 PM

Let me know if you can talk before we can talk to Sherry

6/25/17, 8:11 PM

I have an idea on how we can keep the same valuation

I can tell you on the way back

7/22/21, 1:32 PM

Just a reminder to notarize and send the satisfaction of lien document

Ok on it. Will try tomorrow

Read 7/22/21

Thanks

9/9/22, 1:54 PM

Hey bud...hope you're well.

The SureBright CEO connected with me recently on LinkedIn. We are talking Monday. Sounds like they need sales leadership.

What's your take? Worth the conversation? I've entertained leaving PayIt as of late but would take a lot for me to do that.

9/9/22, 4:13 PM

Happy to share brief thoughts

9/12/22, 1:24 PM

Who were those three competitors to SureBright again?

Clyde, Mulberry, and Extens

*extend

Liked "Clyde, Mulberry, and Extens"

There is also Armadillo for home warranty

Ok thank you

9/13/22, 5:02 PM

Do you have Kai and Manish's emails by chance?

I think it's just their first names @ never mind

Yes

9/21/22, 2:52 PM

Just interviewed with Manish. Definitely went well. I pitched a whole 3 phase go to market approach. Very impressed with his background didn't realize how successful and educated that guy is.

Anyway, let me know if he reaches out to you and before you talk to him. He didn't say he was going to but just in case. I want to make sure we are aligned on what we have done together and tell you what I emphasized so you know going in

I should be talking with Manish next week

Tony and I are probably going to help them with final round interviews

Yea he told me he had to get someone like an investor to interview me

I hope you interview me. That would be a blast

9/22/22, 12:46 AM

Sure would be

9/26/22, 6:25 PM

I'm interviewing with Tim Griffin from MPG Fund tomorrow afternoon

Nice

You know him?

I do not, I really only know InsurTech Funds

I don't know many FinTech funds

Oh he is on Surebrights cap table

Ok. Also does SureBright have a commission plan they can share do you think ?

Liked "Oh he is on Surebrights cap table"

They don't have a commission plan

I think Manish is negotiating it individually with each sale person

Which obviously needs to be corrected

Probably a good idea for you to propose to build one

That happened here at Paylt and got out of control. Then add in the fact that both Paylt and SureBright have a revenue model based on performance post implementation and it's gets real even messier

Exactly

SureBright's revenue is almost 100% based on post implementation

The good thing is that is not too long in the future

9/28/22, 6:52 AM

Attachment stored in iCloud:
IMG_7111.PNG (Image)

Attachment stored in iCloud:
IMG_7118.PNG (Image)

I'm on the train heading the NYC for the ChainLink Smartcon 2 day conference. Speakers like Eric Schmidt who is now on chainlinks BOD and the likely candidate for CEO of chainlink soon.

Anyway, I'll be attending two sessions on blockchain for the future of InsurTech. Curious to talk to you about this in the future, both as it relates to what you're investing in and how this may apply to companies like SureBright.

Ps...the call with Tim the FinTech investor went really well yesterday. Great guy. Would be a valuable resource as he's accomplished and a Y-Combinator grad.

He said Manish needs to realize he should be hiring a peer for this role and that's my approach going into negotiations.

9/28/22, 8:11 AM

We have one Web 3.0 company we are looking at for our portfolio

Glad to hear the call with Tim went well

I should definitely connect with Tim at some point

For negotiations with Manish, I may recommend you talk with my friend Rathu who negotiated with him, but it ended up not working out

So you know where you can cannot push

That would be ideal. Please make the connection when you can

Ok, I just texted Rathu, once I hear back I can intro you via Text

Liked "Ok, I just texted Rathu, once I hear back I can intro you via Text"

9/28/22, 2:46 PM

What is Rathu's last name? Just spoke to him and asked me to connect on LinkedIn

Niyogi

Check out Rathu Niyogi's profile on LinkedIn

<https://www.linkedin.com/in/rathuniyogi>

Ok thanks

9/30/22, 2:44 PM

Attachment stored in iCloud:
Screenshot 2022-09-30 at 2.44.00 PM.png (Image)

Seems like it comes down to if you want to adjust to their low base or not

I feel like this sets up well to propose a three month retainer. Based on what I heard from Rathi I'm not sure they are ready for payroll, benefits, etc

Good idea

10/4/22, 5:58 PM

Attachment stored in iCloud:
Screenshot 2022-10-04 at 5.57.48 PM.png (Image)

Hey buddy, are you free tomorrow to discuss the above?

7am - 8 am or after 6:15pm

My schedule is pretty packed

If you want, I have a few mins now

Can you give me another 10-15 mins

I got in another call

No problem thank you

If I miss your call later, I will call you before 730am est tomorrow

10/5/22, 7:28 AM

I have until 8 if you wanted to talk more about SureBright

I appreciate that. I have a good direction for a counter and will use your idea. I'll be talking to Manish tomorrow afternoon so I'll likely share what I'm going in with

Ok

10/23/22, 2:48 PM

Did you decide to move forward with SureBright?

Yes. Waiting for the offer letter. Delays based on concerns I highlighted about international hire

But I've met my AE who I like and started giving him some direction until I get there

Sounds like you had the right intuition

That's good you found the AE

Their hire but I very much like

Either way having someone you can work well with is helpful

Big time

I am excited to see what you can get done

Same

I think you can really speed up their pace

Chance to make a unicorn

It's the most excited I've been for an opportunity. I like the pressure. Have been ready

E-commerce is an exciting space

Nice that you have fast decision makers

I have a plan I'm forming. Would love to run it by you.

Sure

I'm also visiting soltech on Tuesday if you happen to be in Bethlehem area

Customer discovery

Great idea

I will be flying back from the conference I am at today

Ok. Let's talk after. More of my plan will form from that.

Maybe if you are up there you can line up meetings with other BFTP companies

Or meet Danny Yousef, he has a bunch of e-commerce clients

DAY Vision Marketing

I'm gonna have to make a second trip because I only have a window of time on Tuesday but I definitely need to tap your Network for those

Ok

10/26/22, 7:59 PM

Saw you called, I can talk later tonight if you would like

10/26/22, 9:38 PM

I'm free now if you are

I'm driving until 11 PM. Or we could talk tomorrow. I just left Soltech. They are coming on board with SureBright, but also presented another very interesting revenue opportunity.

Ok, wrapping up a call, I can call you for a bit after

Sounds good

10/26/22, 10:50 PM

Quinn Cosgrave - (484) 241-7232

10/27/22, 10:57 AM

Quinn is very interested

Nice

11/3/22, 8:48 AM

We went with seamless AI for SureBright. 3k for 2 licenses. Going to focus on velocity and really only spend on dynamic lead data and a basic crm. Saving the RevOps manicured sales stack for post series A per the advice of a really good CRO mentor of mine. Excited to get into seamless

Manish let me know about a potential meta data play and an expanded role for me he has in mind but I won't know more until I sign my offer letter pegged for mid next week

11/8/22, 7:17 PM

SureBright got two seats for seamlessAI. What's your recommendation for a crm that compliments and considers budget

11/8/22, 8:39 PM

In the past I have used Pipedrive

I have also used Hubspot in the past

They have an 80% discount for startups

Ok good insights thank you

11/11/22, 8:45 PM

Kai is on board with hiring you

And wants you to report to the board

He is also excited to meet you at demo day

I still owe you an intro to David at Motivate

Ok please do. Spoke with Manish. Flat \$20k for 3 months and 6% equity up from 2, opportunity to re-negotiate once we hit the KPIs

Sounds great

I like the upside. Manish said they don't want Kai to present on Tuesday and think I should do it

That's crazy

At Demo Day

Kai is great at pitching the company

I think it is fine to have Kai pitch, he did good at selection day

I would not worry about that

Fine with me

Ok

I was surprised

But could pull it off

That way you can just spend more time meeting the carriers and investors there

I bet there are some with e-commerce companies in their portfolio

I can send you the registration list

If you want to ping any ahead of time

Yea please share. I should have a SureBright email address soon

Ok

Exporting from eventbrite now

We have to different lists

So I will send you both

Ok.

Then if you really want to maximize the day, there is an underwriting data public event in the evening

4:30 - 8pm

Ok and can you send me the address and any registration and what time to be there

43 W 23rd Street, NY, NY

Ideally by 9am, that's when it starts

It is essentially just all the companies pitching all day

So you can reach out the investors and schedule meetings

If you need you can use our office or conference rooms

The whole thing is in our office

Ok I can register in eventbrite?

I am registering you now

Ok cool

For Demo day we are using both a spreadsheet and eventbrite

Eventbrite is really only for the investors

That's why the sheet I sent you has 2 tabs

Possibly with some overlaps

Ok on mobile I'll check it out

Ok, you are all set for registration

Awesome. Gotta get some biz cards. Time to get to work

Sounds good

11/12/22, 8:26 PM

Sent you an intro to David at Motivate, the lead investor

11/12/22, 11:02 PM

Liked "Sent you an intro to David at Motivate, the lead i..."

11/13/22, 10:49 AM

You mentioned if I really want to maximize the day, there is an underwriting data public event in the evening. Can you share that registration page? I can attend as I'm taking the train - arriving 745am and train leaves at 830pm from Penn station

You are already registered. If you leave the event at 8pm you can get to Penn station on time.

Ok both events at same location ?

Yes

Great.

11/15/22, 7:36 AM

Interesting first day at SureBright yesterday. Looking forward to catching up today.

As for the 5 minute pitch, Manish wants me to kick it off for first 30 seconds just to introduce myself to the room and show SureBright is expanding with leadership then pass to Kai.

What do you think?

You can certainly do that

It is what you think works best

Most people will have no idea who Kai is

Ok great

Or SureBright

So I don't think it would make a difference

Agreed see you soon

11/15/22, 11:37 AM

You are up after Sola

2 from now

Can you bring Kai in on the side of the stage?

Yup we will move to other side of stage after this pres

11/15/22, 7:23 PM

I ducked out to meet an old UiPath colleague of mine downtown. Then heading to train.

Great event today. Was really rewarding to see how legit InsurTechNY is. You guys are doing big things.

Thanks again and talk soon

Glad you enjoyed it

Sitting with Tom Young on the train and going to get involved with InsurTechPhilly.

Nice

11/29/22, 8:24 PM

Hey bud...are you free for a screenshare tomorrow or Thursday ? I could use a set of eyes on the SureBright lead flow tech stack and process I'm standing up. It's getting a little messy and manual. Wanted to see what you think.

After 4:30pm tomorrow works

11/30/22, 4:53 PM

Could we start our call at 5:10 or 5:15pm?

12/1/22, 8:34 AM

Hi david, could you please intro me to Stare or Stair I'm not finding them. The potential insurtech partner you told me about

Sure it is Stere

I can make the intro shortly

12/1/22, 10:59 AM

Ah Stere! Ok thank you

12/19/22, 11:24 AM

Can you let Manish know his .ca email is bouncing for some reason

12/19/22, 3:14 PM

Please don't use that email anymore please use the.com the other one will not work for a longer reason that I feel like explaining here but could you re-intro him or I can jump in and CCmanish and usethe.com

Voice to text may have some typos in that

Ok

12/20/22, 9:15 AM

Hey bud...do you have 10 minutes this morning to chat?

At 9:35

Ok I'll call thx

12/20/22, 2:54 PM

I emailed Dogan this morning but am yet to hear back. If possible, we could use a nudge from any direction as these are our do or die deals perhaps

Sure, do you want to just call him or his business partner Rick?

Here is his cell: 646.784.2099

Rick Wiseley - (804) 525 - 0774

1/24/23, 5:43 PM

Hey bud, have time this week to catch up?

You free in a few mins

On call

1/24/23, 8:40 PM

I am going to Colorado tomorrow until 2/2. So best times will be late in the day

After 4:30pm MT

Ok sorry was super busy this evening. I'll try you then. Just want to talk through my first two months and get your perspective

Sounds good, curious to learn more

1/29/23, 11:00 AM

Hey bud can't call back today. What works this week? Thinking 15 minutes will work

Nothing pressing

This week is tight. I am running an event in Colorado

Friday morning is best

Liked "Friday morning is best"

2/8/23, 9:01 AM

Hi david, hope your trip went well last week. Let's catch up this week if you can. I'm at the end of my 3 month contract with SureBright and that brings to the table several things I'd like to run by you for perspective and advice between us

Sure, I have time tonight between 5 and 6

Or Friday morning

Ok I'll call at 530 today

Ok

2/8/23, 5:24 PM

Wrapping up a call

Ok

2/21/23, 2:07 PM

Now that the dust has settled I'd like to catch up perhaps end or week or next week. Free any specific day or time?

2/21/23, 9:12 PM

Friday around 4pm

I will call your cell then

2/24/23, 4:43 PM

Finishing up a call, can call you closer to 5:30pm

Liked "Finishing up a call, can call you closer to 5:30pm"

3/21/23, 11:37 AM

Free this week to catch up

?

Sure

I will be driving up to Long Island on Sat morning

Would that work?

Yup

Great, just give me a call before 11:30am

Wanna text me when ready or I'll just call

Ok

3/25/23, 10:27 AM

Sorry again I can't call had something come up

All good, I ended up pushing the trip to next Sat

9/19/23, 3:15 PM

Great connection with Nathan. Just signed contract with him. He starts at 4pm! He can do what we need. Thank you my friend

9/24/23, 3:21 PM

I'm driving all day today I love you catch up so give me a shout if you have time today?

Ok, I can

OK what time are you aiming for no rush just planning a couple other calls

Give me 5 mins

Actually 15-20 mins

No prob

10/24/23, 10:12 AM

Hey bud, hope you're well. Nice catching up a few weeks ago. I was curious if I could tap you for your legal expertise on a contract I'm signing for this solar company I'm working at. I'm happy to pay.

10/26/23, 9:18 AM

Sorry for they delay, just got back late last night from a conference in Omaha

Yes, I would be willing to review

Can it wait till the weekend?

Totally. Text me when ready. I can send it to you ahead of time

Feel free to send me the docs tomorrow then I can tell you on Saturday the options

I really appreciate this. It's a little outside of the box of a contract. I scheduled the email/contract pdf to send to you tomorrow morning. Happy to pay as well, so dont be shy

Ok. I think if it is a quick review I can just give you feedback. If you need me to redline or help negotiate, I would probably ask you to pay something

5/9/24, 9:32 AM

Hey david, hope your well buddy. We should catch up. I moved to Florida months ago. St Petersburg to be exact. You're welcome anytime. We always have guests or friends at conferences in the area stay here. Anyway, in the meantime I was thinking about that hatch house snowboard recently. Do you happen to still have it?

Ya, I still have it

Would you like me to mail it to you

Or have it for you to pick it up

It should be in my parents basement

I'll pay to ship

I can confirm with them

You planning a ski trip?

Btw you still owe me a race

Ok I'd appreciate that. Nothing urgent I'm just redoing my office and am hanging a lot of cool stuff from the past. Starting a new business. Going back to online courses. I've always wanted to go hard at that business model and have the time, space, and freedom to do it. Giving myself six months. Would love to catch up sometime and get your updates as well

That's great

I have a course idea that I would be interested in JV-ing with you on

That I can get guaranteed free traffic for

Happy to share when you have some time

2649 Tifton St S, Gulfport, FL 33711

For whenever you mail

Free today? Would love to hear it. I'm in. 100 percent in

Sure, I have calls most of the day, but could talk at 5pm

Possibly earlier if my 3-5 wraps up sooner

Ok

Text me when ready? I'm free all day

Ok

5/9/24, 3:06 PM

I can call you in a few mins

Free in 20?

Ok

I can call you at 3:30

Perfect thx

5/14/24, 8:35 AM

One other course idea I had for you

B2B enterprise sales for X sector

You can start with FinTech

If you wanted to do one for InsurTech, I could get you all the subject matter experts

5/14/24, 10:58 AM

Ok good idea. I'll add to the list

We have a big notion install this week. I have other guy I partnering with on this.

I'm a big studier and proponent of the Second Brain methodology by Tiago Forte, not sure if you know of building Second Brain infrastructure for internal data or not. Very cool. Been my obsession for a few months.

The notion I bought is second brain formatted. Pretty cool

You then add AI on top of properly structured & tagged internal data instead of searching files/folders in a traditional data taxonomy structure.

If you have a strong knowledge base organized in your second brain, you can generate content very quickly with the AI that sits on top of it - video ideas, scripts, landing page copy, full blogs, original whitepapers, etc. etc. etc.

I'm reviewing the book detail today/tomorrow.

Let's book our kickoff meeting for the near future. We are in. NDA forthcoming.

Since we are both busy, provide me availability of some days and times in the near future to discuss our mutual next steps and I'll be prepared with a recommended framework for us to start with

Invite your female partner in this for that meeting - forget her name

Edited

5/14/24, 12:17 PM

Here are a few options: Friday 5/24 at 2pm; 5/29 at 3pm; 5/31 at 3pm. Once we figure out the best day, I can invite Michelle

5/24/24, 12:43 PM

NDA revised and shared to your personal account. looking forward to the 2pm

5/24/24, 1:58 PM

Thanks

5/24/24, 2:59 PM

good call appreciate the time and detail . way further along and mature than i thought

All good

5/29/24, 9:01 AM

good morning! i expect to have a next steps partnership summary to you by tomorrow afternoon.

if you have 10 minutes tomorrow before i send it to chat please let me know.

Sure, 2:30 - 3 is best

I will call you at 2:30 PM tomorrow. Let me know if you want a calendar invite.

Yes, please send an invite

sent to your insurtech

Thanks

5/30/24, 2:34 PM

Need to grab another call, I will call you back right after

ok i'm expecting a call so i might not be able to pick up. is this evening open if that happens? 10 min max. likely 5 min really

I am free till 3pm

Or 6-6:30

only had that 15 minute window apologies. free on a drive home or this evening

ok

Ok

6pm i'll call

ready to share but need to ask questions first thanks

Ok

5/30/24, 5:21 PM

can you please share the audio book creation / publication paragraph quote you mentioned. is that something you don't mind me seeing? i believe i have a solution that would dovetail well with the rest of my concepts i'll surface here soon

thanks for sending. discussing with john now and will call you in 10-15 and be off the call by 6:30

Ok

5/31/24, 3:20 PM

Hey, i have a small emergency today my wife's work called me bc Melissa is at work at Tampa General Hospital and got hurt somehow but is okay but im heading there in traffic for over an hour now i cant send proposal from mobile . Shes okay and im ready to send just hoping to be straight up and avoid any perception of disinterest or slow to send what we discussed hesterday

No worries

Thanks for the update, hopefully everything is ok with Melissa

6/1/24, 10:01 AM

➔ Replying to David Gritz, 2024-05-31 15:57:30: « Thanks for the update, hopefully everything is ok with Melissa »

All is good now. back on her feet. Thanks again. Will share

6/1/24, 2:20 PM

Glad to hear

6/3/24, 1:22 PM

Can you share availability for this week assuming you two have some to get on calendar

Ill send invite and our go-forward

Friday end of the day would be best

Like 4:30pm

Ok

But check with Michelle by email to confirm she is available

I will be in NYC Tue - Thu

For a conference

Ok

6/4/24, 7:11 PM

No response from Michelle. Dont want to let this week end before having the next meeting. Excited to present it. Can i throw 4:30pm this friday on your calendar and feel free to add michelle or tell me shes in and ill add her ?

Ok

6/7/24, 11:37 AM

I can't join our call until 5pm

Have a call with a prospective portfolio company between 4pm and 5pm

It is ok if you start with Michelle

Id like to have you on. I have 45 minutes. How about this...im ready to share. Why dont i record it in under 15 minutes. Screen recording

Then I can join at 5

I can just join a bit late

Ok

Talk then

Delivered