

## **PARTNERSHIP PROFILE**

Company name:

Years in business:

Physical address:

Website:

LinkedIn profile:

Number of employees:

Average loan volume a year:

### **BUSINESS LEADERSHIP:**

- Please list names, titles, and direct emails:

### **GO TO MARKET STRATEGY:**

- Please outline how your company goes to market, the goals of the company, and the strategy to differentiate from the competition. (i.e. lead gen, products/services sold, value prop)
- How do reps source leads? What is their role in the strategy?

### **PREFERRED LENDERS:**

- Who are the top lenders you work with and why? Please include estimated monthly volumes with these lenders.

### **LENDER SELECTION:**

- Please explain the process for selection process to pick lenders & submit deals.
- Please list all people in this group & provide direct emails for communications.

## **PARTNERSHIP PROFILE**

### **OFFER SELECTION:**

- Please explain the process of how offers get selected to be pitched to merchants. (i.e. do team leads look at all offers and screen for the reps, do reps make their own decisions, and so on.)
- Please list all decision makers names and emails below.

### **ADDITIONAL INFORMATION:**

- Please list any other information that would be useful for IOU Financial to know about your business and how to build the best partnership with your firm.