i2I Services: 6-Step Process

This framework supports implementation following strategic review and advisor coordination within the family's existing advisory structure.

1) Execution of Confidentiality and Client Service Agreement
2) Client Registration
3) Client Purchase Agreement
4) Escrow Funding
5) Tax Credit Processing and Delivery
6) Tax Credit Payment & Success Fee Release

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STEP 1:
Execution of Confidentiality and Client Service

Protecting Sensitive Information

Clients sign a Non-Disclosure Agreement to safeguard confidential business information and data exchanged.

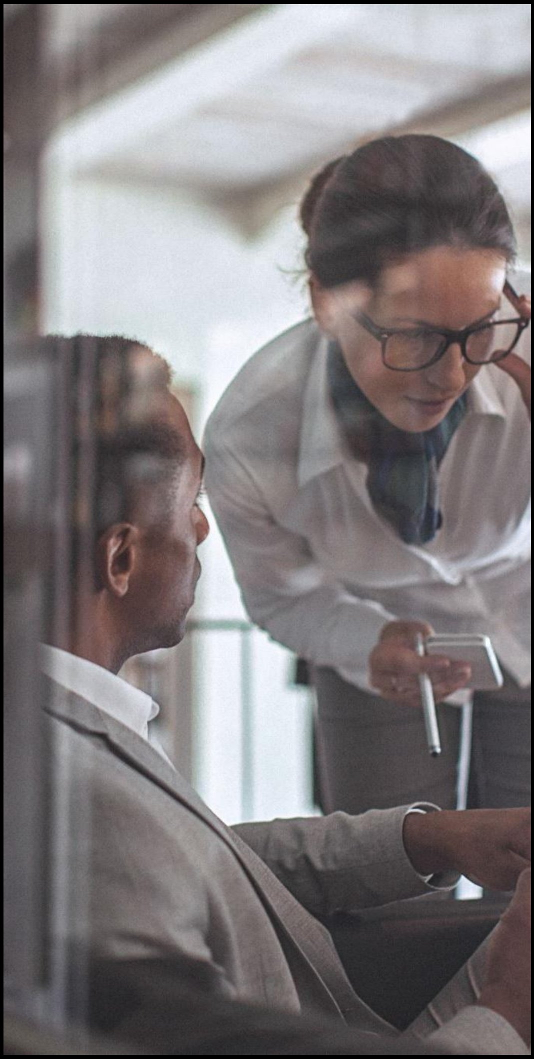
Establishing Clear Expectations

Client Services Agreement sets defined terms, responsibilities, and expectations for both parties involved in the service.

Ensuring Mutual Understanding

The agreement process guarantees confidentiality and shared understanding for effective service delivery.

STEP 2:
Client Registration



Accurate Data Entry

Entering client details into the CRM ensures information is precise and ready for partnership activities.

Foundation for Relationship Management

Proper registration sets the groundwork for effective client communication and ongoing relationship management.

Streamlined Service Delivery

Accurate registration enables efficient tracking and delivery of services throughout the carbon credit partnership.

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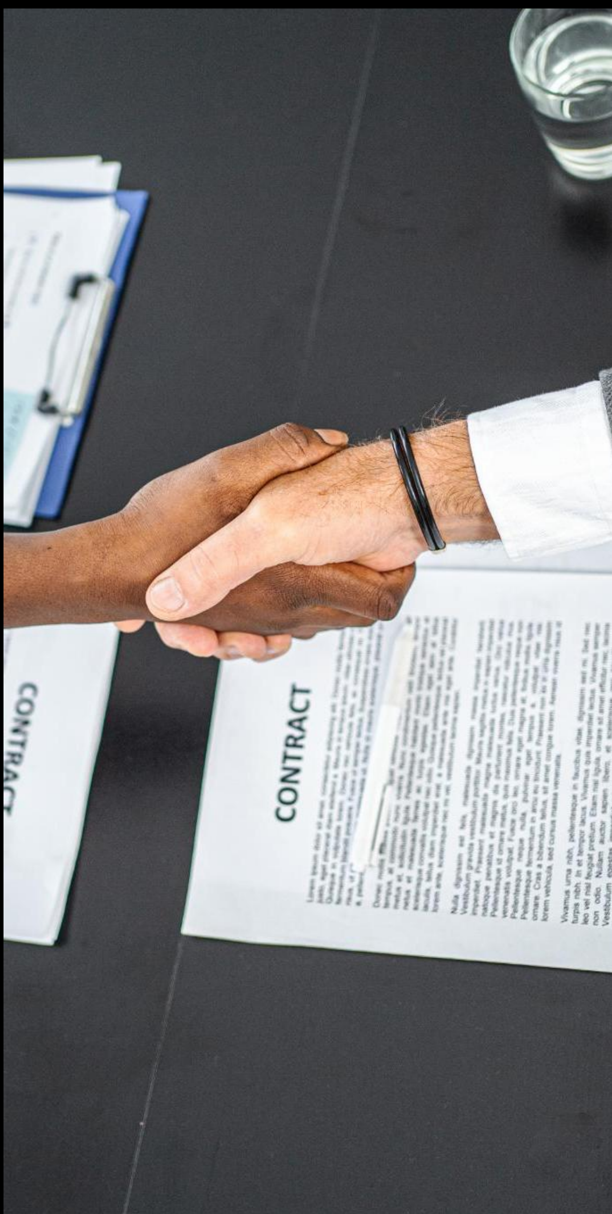
STEP 3:

Client Purchase Agreement



Receiving Instructions

Clients are sent clear email instructions on how to complete and sign the Purchase Agreement for the transaction.

Formalizing Commitment

The Purchase Agreement establishes the terms and formalizes the client’s intention to proceed with the transaction.

Ensuring Legal Protection

Signing the agreement offers legal protection and mutual understanding for both parties, supporting a smooth partnership.

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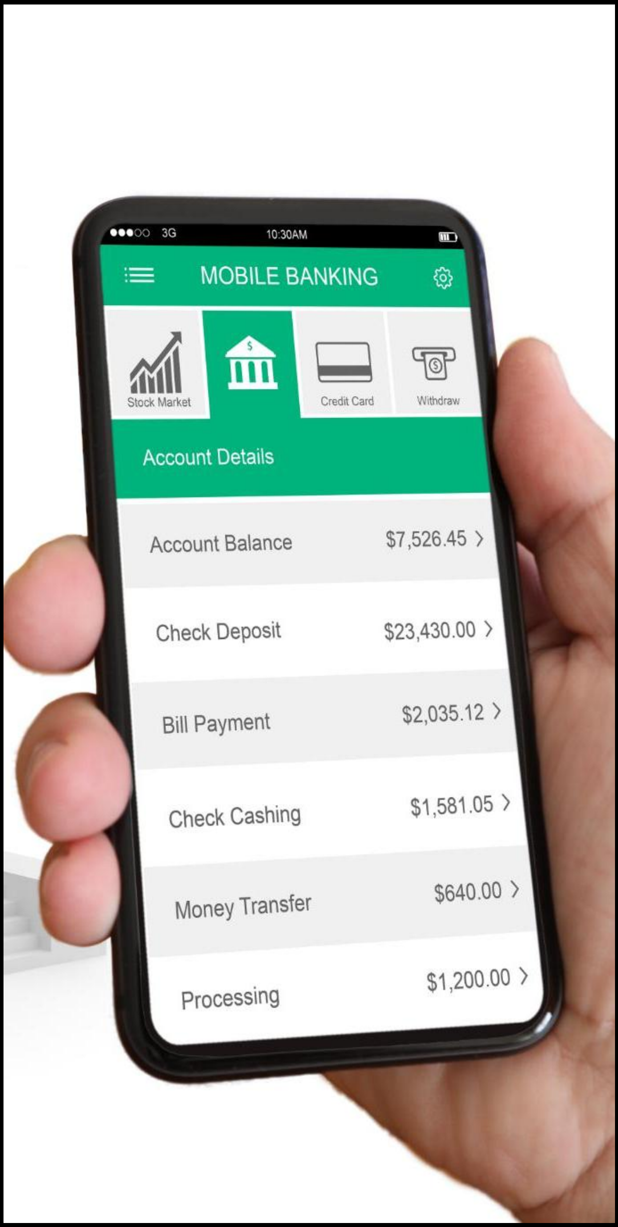
STEP 4: Escrow Funding



Receiving Wiring Instructions

Clients are provided with secure wiring instructions alongside their Purchase Agreement to initiate the transaction process.

Fund Transfer to Escrow

Funds are transferred to the Bank and held pending delivery and client confirmation of the tax credit package.

Completion and Distribution

Upon completion, the purchase amount is transferred to the client's account and the remaining balance is retained as the company's fee.

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STEP 5:
Tax Credit Processing and Delivery

Comprehensive Tax Credit Package

Clients receive a detailed tax credit package prepared by experts, ensuring all necessary documentation is included for IRS submission.

Rapid Delivery Timeline

Tax credit packages are usually delivered within 5 to 7 business days, ensuring clients receive their materials quickly.

Maximizing Tax Credit Benefits

Timely submission of the tax credit package with the tax return guarantees efficient IRS processing and maximized benefits.

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STEP 6:
Tax Credit Payment & Success Fee Release

Client Confirmation

The payment process begins when the client confirms receipt of the complete tax credit package.

Bank Payment Authorization

Once confirmation is received, the bank authorizes payment release, facilitating the transaction process.

Compensation Distribution

The Carbon Credit Partner is paid for the credits acquired, and the Company receives its success fee, ensuring transparency.