



WHERE DATA  
MEETS CONNECTION

**PRODUCT  
OVERVIEW**

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## DO YOU TRULY UNDERSTAND YOUR STAKEHOLDERS?

**FACT:** Companies that don't understand their shareholders are already losing them.

**FACT:** Your shareholder data and who follows your company is the key to retaining and growing your investor base. If you don't understand your data, you're losing valuable market capitalization.

### Unlock the Full Potential of Data Driven Investor Engagement

In today's competitive market, understanding and effectively communicating with your shareholders is essential for growth and sustainability. **InvestorLink360**, powered by our **Unified Progressive Investor Profiling Platform (UPIPP)**, is your comprehensive marketing, communication, and data platform designed specifically for publicly traded companies. We empower you to engage, segment, and grow your shareholder base seamlessly while leveraging advanced data analytics.

## OVERVIEW

**InvestorLink360** transforms the way you connect with investors. By integrating your existing NOBO lists, email databases, and social media channels, we provide you with unparalleled insights into your shareholder base through our proprietary **Progressive Profiling** system. Our platform scrubs and optimizes your data, helping you build robust investor profiles, communicate effectively, and drive shareholder engagement.

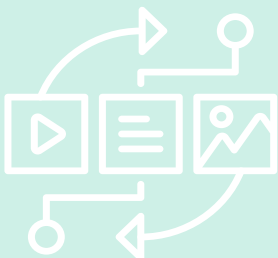
**InvestorLink360** goes beyond just data management—we support your **in-person investor events** and enhance them with targeted **one-to-one** and **one-to-many** engagements, ensuring personalized connections with both current shareholders and potential investors. Plus, our integrated webinar support makes virtual events effortless, expanding your reach while maintaining a personal touch.

Whether it's a press release distributed to your entire base or a geo-targeted event invitation, **InvestorLink360** ensures your communications are precise, impactful, and tailored to your audience. We provide a single, powerful platform for all your investor communication needs, including **email** and **SMS campaigns**, **CRM management**, **social media hosting**, and **event coordination**.



## KEY BENEFITS TO YOUR COMPANY

- 1 Data-Driven Shareholder Insights:**  
Understand exactly who your shareholders are with dynamic profiling and segmentation
- 2 Progressive Profiling:**  
Build comprehensive investor profiles over time by matching followers across multiple channels.
- 3 Targeted Communications:**  
Geo-target investors for events, segment for personalized messaging, and engage with precision.
- 4 Event & Webinar Support:**  
Enhance in-person investor events and host seamless webinars for deeper connections with shareholders and prospects.
- 5 Enhanced Database Management:**  
Clean and optimize your existing databases to ensure accurate and actionable insights.
- 6 Comprehensive Monthly Reporting:**  
Stay informed with detailed reports tracking growth, engagement, and database health.





## WHAT YOU GET



### FOUNDATIONAL PLATFORM

-  Onboarding and data integration of NOBO lists, shareholder lists, email databases, and social media followers
-  Unified Progressive Investor Profiling Platform (UPIPP) with advanced Progressive Profiling
-  Comprehensive email and SMS campaign management, social media hosting, and event coordination tools
-  Integrated support for webinars and virtual investor meetups
-  Monthly reporting and database growth insights

**SET UP FEE:** Starting at \$1,000

**BASIC:** \$1,000/month

**PRO:** \$2,000/month

### **PREMIUM ADD ON SERVICES:** Optional

**SOCIAL MEDIA, EMAIL, AND SMS CONTENT MANAGEMENT:** Starting at \$1,000/month

**GOOGLE CAMPAIGNS (INVESTOR SEARCH VISIBILITY):** Starting at \$5,000/month

**AWARENESS CAMPAIGNS (VIDEO & PRESS DISTRIBUTION):** Starting at \$5,000/month

**EVENT SUPPORT (WEBINARS, INVESTOR MEETUPS, CONFERENCES):** Starting at \$5,000/month, custom pricing available based on needs



# INVESTORLINK360 TECH STACK

Unified Progressive Investor Profiling Platform (UPIPP)

**DATA SOURCES**

- Shareholder List
- NOBO List
- Email List

**DATA INTEGRATION**

- Data Cleansing
- Data Enrichment

**ICP**

- Unified Investor Profiles
- Dynamic Segmentation

**OUTBOUND MESSAGING**

- Templated & Quick to Deploy
- Personalized, Targeted Communication

Social & Paid Media Channels

**INVESTOR ENGAGEMENT**

- In Person Events
- Webinars
- Press Releases
- Shareholder Surveys

**MEASUREMENT**

- Automated Insights
- Customized Apps
- Deep-dive Analysis
- Performance Dashboards

**DATA INGESTION & UNIFICATION:**  
We integrate NOBO lists, email databases, and social media followers into a centralized platform—your **Unified Progressive Investor Profiling Platform (UPIPP)**, specifically for public companies.

**DATA CLEANSING & ENRICHMENT:**  
Our proprietary tools clean and enrich your data, appending missing information from third-party sources to build detailed investor profiles.

**SEGMENTATION & PROFILING:**  
Dynamic segmentation by geography, behavior, and investor interests allows for precise targeting. Profiles evolve over time through ongoing interactions, creating a comprehensive investor view.

**ACTIVATION & COMMUNICATION:**  
Centralized tools enable multi-channel outreach—Email, SMS, WhatsApp, Social Media, Paid Media, and even postal mail—all from one intuitive dashboard.

**EVENT & WEBINAR INTEGRATION:**  
Seamless support for both in-person and virtual events, with tools to manage invites, RSVPs, follow-ups, and post-event engagement.

**REPORTING & ANALYTICS:**  
Comprehensive dashboards and custom reports provide deep insights into engagement, growth, and investor retention metrics.



## WHY INVESTORLINK360?

### Your Shareholders Are Slipping Away & You Don't Even Know it

We are not just a platform; we are your strategic partner in investor communications. Our proven process ensures that you not only retain your shareholders but also convert followers into new investors while maximizing the value of your data.



#### DATA FIRST STRATEGY

We transform your existing data into an asset that allows you to better understand your investors



#### PROGRESSIVE INVESTOR PROFILING

Build the most complete investor profile by leveraging data from every interaction



#### SEAMLESS COMMUNICATION

Reach the right investors with the right message at the right time on the right channel



#### EVENT & WEBINAR EXCELLENCE

Support for both in-person events and virtual webinars ensures comprehensive investor engagement



#### END-TO-END SUPPORT

From data onboarding to campaign execution, event coordination, and reporting

## NEXT STEPS

1

#### Initial Onboarding Meeting:

Schedule a call to align on goals and timelines.

2

#### Data Integration:

We begin onboarding and cleaning your existing databases.

3

#### Platform Activation:

Launch campaigns, coordinate events, and start building comprehensive investor profiles.