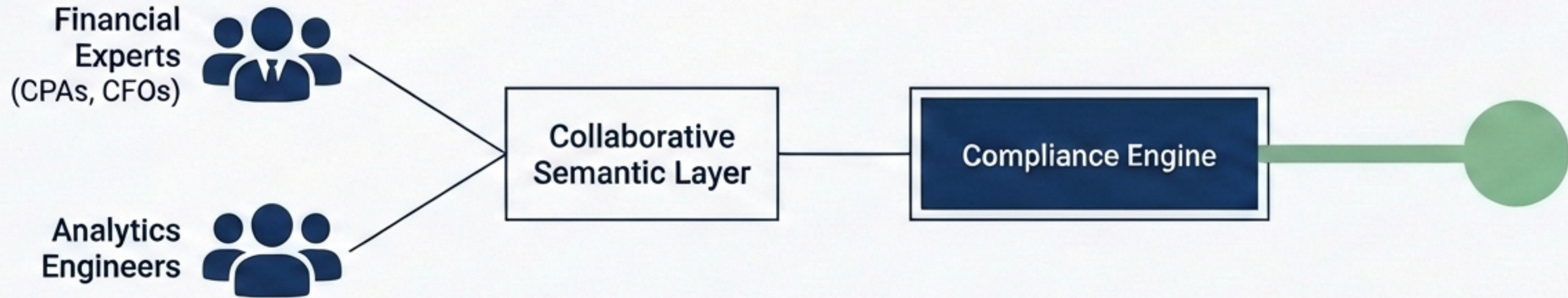


Joining the IQ Finance Network

An invitation to the
Advisor & IAB Leader role



Solving the data and decision-making gap in financial compliance



The Problem

Financial operators lack reliable audit trails and unified data, making it difficult to make confident, compliant strategic decisions at scale.

The Solution

IQ Finance has the data and analytics engineering talent, but we need world-class financial operators (CPAs, CFOs) to collaborate with our team. This partnership is crucial to codify the semantic layer and build the automated compliance and performance intelligence engine with flawless audit trails.

Gathering the sharpest financial minds to solve one core problem

- The IAB is a curated, high-signal networking group of industry leaders.
- **Our goal:** improve decision quality, increase qualified opportunities, and surface market risks early.
- Members are selected purely for direct buyer/partner access or high-signal domain expertise.
- You get to collaborate with peers on a core industry problem—without leaving your day job.



Orchestrating the brain trust as an Advisor and IAB Leader

You are the guide, not the builder. You manage the cadence and follow-through of the IAB.

What You Own

- **IAB Program Ops:** Confirm members, run bi-weekly scheduling/agendas, drive follow-through.
- **Product Feedback:** Convert IAB input into backlog-ready guidance.
- **Partnerships:** Maintain a small partner target list and close written referral intent.

Weekly KPIs

- 1 IAB meeting executed every 2 weeks
- 3 actionable product inputs per meeting
- 1 strategic partner signed per 60-day sprint

Clear boundaries protect your time and our execution

In Scope (The Strategy)

- ✓ • Setting IAB priorities.
- ✓ • Capturing actionable follow-ups.
- ✓ • Supporting select discovery calls.

Out of Scope (The Heavy Lifting)

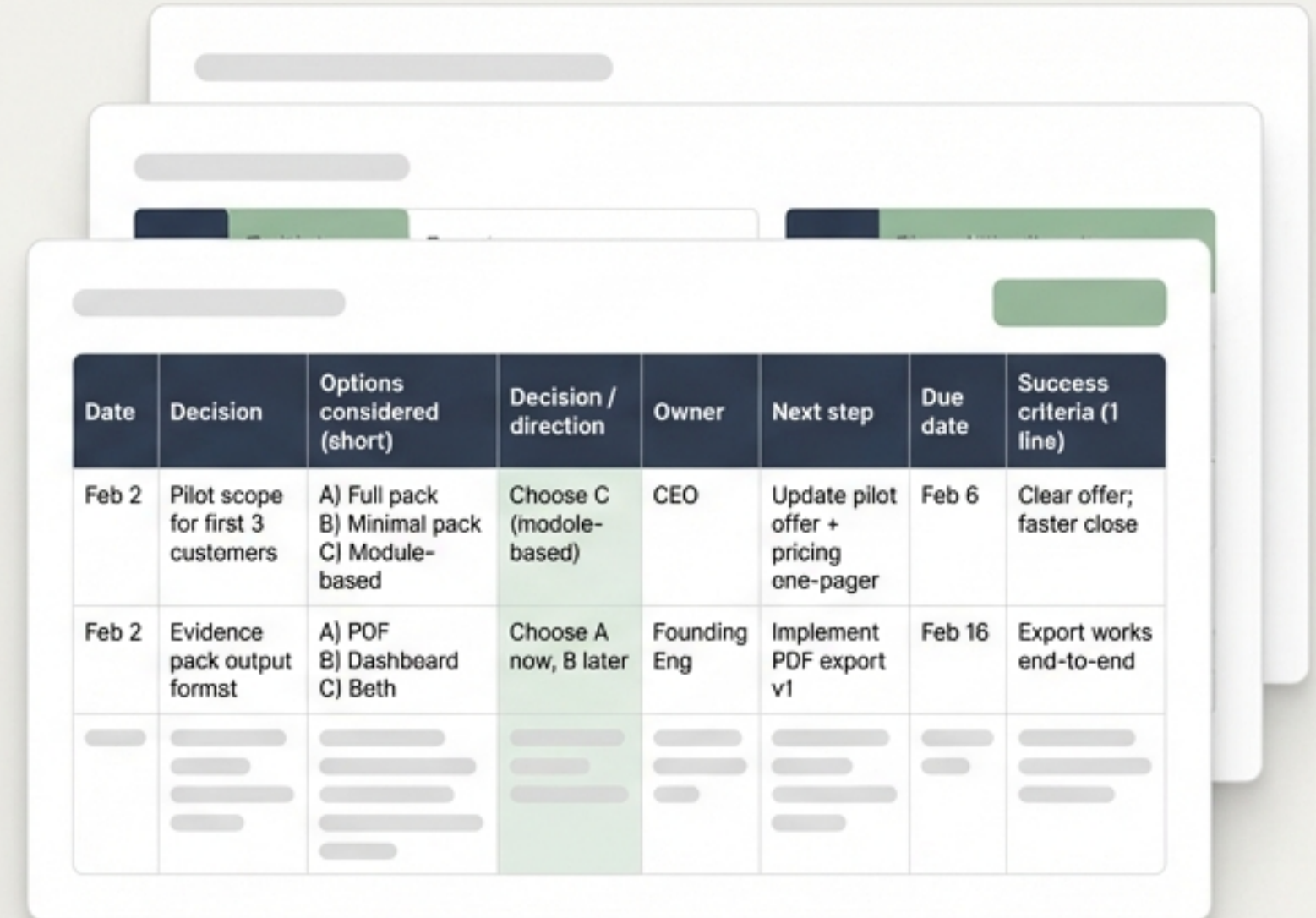
- ✗ • No fundraising execution or solicitor activity.
- ✗ • No sales execution or contract closing.
- ✗ • No product building or engineering management.
- ✗ • No marketing strategy execution.

Pre-built rails make your operational burden near-zero

We have already built the Operating System. You simply plug in and drive the conversations. Commitment is strictly 30-60 minutes, bi-weekly.

The Toolkit

- **Default 60-Min Agenda:** Pre-structured to lock 1-2 product decisions per meeting.
- **Decision & Intro Logs:** Simple trackers to ensure accountability.
- **Email Templates:** Pre-written copy for scheduling, pre-reads, and recaps.



Date	Decision	Options considered (short)	Decision / direction	Owner	Next step	Due date	Success criteria (1 line)
Feb 2	Pilot scope for first 3 customers	A) Full pack B) Minimal pack C) Module-based	Choose C (module-based)	CEO	Update pilot offer + pricing one-pager	Feb 6	Clear offer; faster close
Feb 2	Evidence pack output format	A) POF B) Dashboard C) Beth	Choose A now, B later	Founding Eng	Implement PDF export v1	Feb 16	Export works end-to-end

A structured, milestone-based engagement.

Our approach is designed for flexibility and clear progression, evolving as we reach key objectives.



Key Principles

- Begin with a focused initial scope to **establish alignment** and **define milestones**.
- Conduct regular reviews to assess progress and mutual value. Scope and pace are adjusted based on outcomes.
- The role evolves, renews, or concludes **at each milestone, ensuring continued alignment of interests**.

Standard boilerplate designed to protect both of us



Advisory Only

You have zero fiduciary liability, no voting power, and no authority to bind the company. You are purely a guide.



Fundraising Guardrails

No broker activity, no holding funds, no compensation tied to capital raised. Absolute compliance.



IP Protection

Your background technology and prior inventions remain entirely yours. The agreement only assigns what we build together for IQ Finance.

Earning equity today, prioritizing cash tomorrow

Phase 1 (Current)

Compensated purely in equity while we build the foundation and hit our early market milestones.

Phase 2 (Post-Funding)

Once capitalized, our earliest advisors are strictly prioritized for cash compensation arrangements.

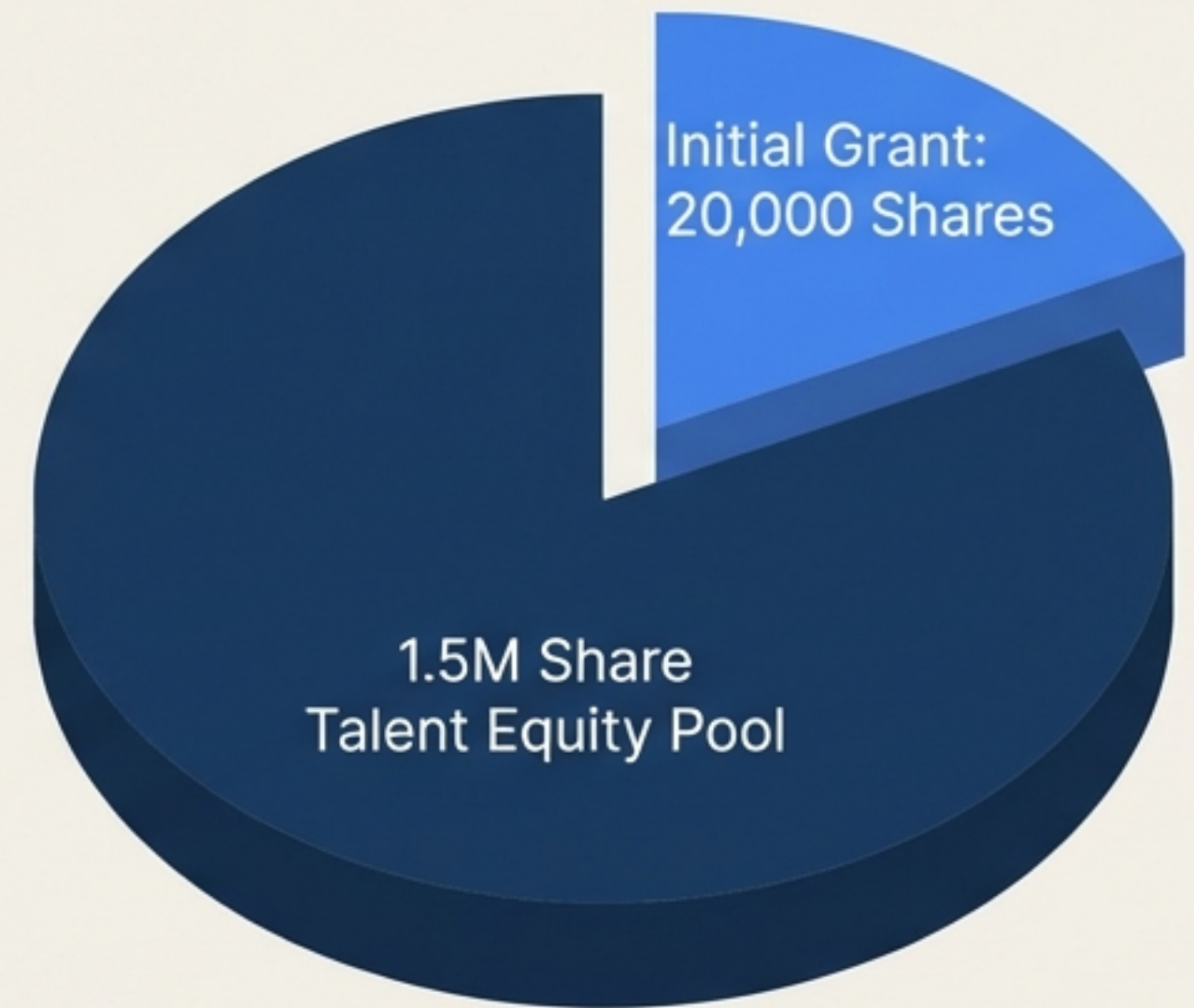
Future Flexibility: As the company grows, your role can expand into a paid advisory board seat, consulting, or remain strictly as an equity-holding IAB Leader—whichever fits your desired lifestyle. Also, your participation increases our likelihood of securing investment—which, in turn, raises the value of your equity and improves the chances of cash compensation.

Your initial equity grant is a good faith wedge to get started

The Initial Grant: We provide an initial grant of 20,000 shares. This is the first issuance from a pre-allocated 1.5M share equity pool specifically for talent, granting you early access to this dedicated resource.

Vesting Mechanics: The grant includes standard vesting over time or based on key milestones. Unvested shares are subject to a repurchase right, ensuring alignment and providing a clear path forward.

Why a Wedge?: Our initial equity grant is an opportunity to align interests and establish early ownership. It serves as a foundation for future contributions and potential growth.



Transparent, milestone-driven paths to earn more equity



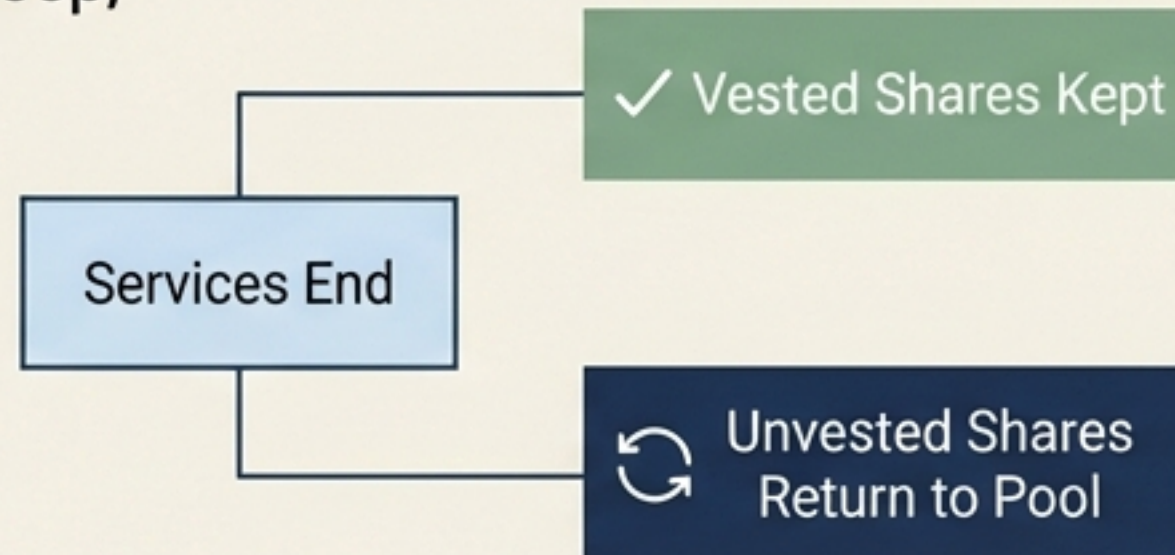
The Roadmap:

We provide a clear path from a flexible advisory role to a dedicated leadership position, aligning compensation with your evolving contribution and the company's long-term success.

A clean cap table means a risk-free trial for you

For You: A True Risk-Free Trial

-  **No Financial Risk**
Unvested shares are repurchased at the original nominal par value.
-  **Keep What You Earn**
Vested shares are yours to keep, even if you leave.
-  **Flexible Engagement**
A 'test drive' without long-term lock-in.



For the Company: A Clean Cap Table for Growth

-  **Recycles Equity**
Unvested shares seamlessly return to the employee pool.
-  **Investor Friendly**
Demonstrates strong governance and avoids "dead equity".
-  **Aligns Incentives**
Ensures equity is held by active contributors.

Let's kick off the first 60-day sprint

1

Review the Docs

Take a look at the lightweight IAB Charter, IP Agreement, and RSA.

2

Align on the Calendar

Pick a recurring 30-45 minute slot that fits your schedule.

3

Run the First Play

We provide the briefing on the current product state; you guide the first IAB discussion.

Let's begin our collaboration and start building together.