



The nation's only database for real estate incentives.

An Affiliate's Guide

Your Reference Guide for Leveraging IncentiFind's Products and Services as a Value-Add.

1. **Review Commercial Deck (<https://incentifind.com/affiliates>)**
 - a. Understand the types of incentives housed in IncentiFind's database
 - b. Understand IncentiFind's value proposition and how it applies to you
 - i. Connecting projects to incentives means you can sell more products and services while connecting your owner to cost-savings
 - c. Understand markets that incentives can be applied to (it's difficult to find a project that isn't ideal for our cost-saving incentives)
 - d. IncentiFind is a value-add NOT a cog in the wheel
 - i. Our 3-Step process requires no more than 2 hours of your time per project
2. **Review our 3 Steps**
 - a. Step 1 SEARCH
 - i. Review and understand our SEARCH Survey. These are the minimum questions required to quickly determine eligibility.
 - ii. It is best to submit our survey early in the project lifecycle for new construction (however, incentives can be submitted no later than 12 months past Certificate of Occupancy)
 - iii. At a minimum IncentiFind requires 60 days before the start of demo or construction on existing buildings
 - iv. Incentives are NOT retroactive (especially for existing buildings)
 - b. Step 2 VERIFY
 - i. VERIFY is broken down into two sub-steps:

1. **Soft-Estimate:** when specifications and quantities have not been approved/ determined, IncentiFind produces an estimate for cost-savings from incentives using historical data. Soft-Estimates are great for new construction projects; projects that are in the feasibility stage; projects in the land acquisition phase (perhaps choosing between two sites)
 2. **Hard-Estimate:** when specifications and quantities have been approved/ determined, IncentiFind can produce a Hard-Estimate of cost-savings. Hard-Estimates are great for projects past the feasibility phase; projects with a well-defined scope; projects that have approved their specs and quantities; fast moving project timelines.
- ii. Understand how to send our VERIFY Reports to your customers
 1. Use the “Share” button on the VERIFY Report
 2. There is NO limit to the number of shares
 3. Tell those you share with to bookmark the link for easy access
 - iii. Understand how to send payments for the VERIFY Reports to your customers; or pay for our VERIFY Reports yourself and bill the customer on a later invoice. There is NO WRONG WAY to pay.
 1. On your “Project Page” click the box on the far right of the project you want to send payment to.
 2. Scroll to the bottom of the page and hit “Send”.
 3. An email will go to the owner to first, register an account at IncentiFind.com and, second, login to pay (to receive access)
 - iv. Understand how to be involved in our VERIFY Report process.
 1. You can be involved on review calls, email correspondences, so long as you have your owner’s permission.
 2. Let us know and we will be sure you are included.
- c. Step 3 APPLY
- i. IncentiFind seamless transitions from verifying eligibility to applying to eligible incentives.
 - ii. Understand WHEN our VERIFY Expert advances your customer to our next step, APPLY. During this step our application fulfillment experts assist your customer with understanding all requirements necessary to capture eligible incentives.
 1. Your “Project Page” shows the stage your owner is in.
 - iii. Your customer will be assigned a single point of contact for our APPLY Services.

3. Review our Marketing Materials

- a. IncentiFind Case Studies can be found here
https://incentifind.com/case_studies

- b. You may use the information in these documents for Co-branded marketing materials. IncentiFind may provide logos, etc. however, all materials must have final approval of IncentiFind.
- c. We recommend that you invite your customers to our monthly demos. They occur on the first Wednesday of every month. You can find the link to register here (https://us02web.zoom.us/webinar/register/WN_u2p-9PDSTKmJfGyAxthF2A)

4. Review IncentiFind's 3-Project Activation Process

- a. To ensure your success in understanding our process and further, our team's alignment to how you serve your customers, we require a 3-Project Activation Process to get you started as an Affiliate.

b. 1st Project = Heavy Engagement

- i. Send an email introducing your owner to IncentiFind. Include:
 - 1. Owner name
 - 2. Owner's company name
 - 3. Project(s) and project location(s)
- ii. IncentiFind will fill-out our SEARCH Survey on behalf of your customer. We encourage you to be on this call to hear how we help the customer navigate the questions.
- iii. IncentiFind will assist the customer as they advance through our 3-Step-Process.
 - 1. We will keep you updated on their progress.

c. 2nd Project = IncentiFind's assistance is optional

- i. IncentiFind recommends that you lead your customer in filling out their SEARCH Survey by using your Custom URL.
- ii. IncentiFind will assist both you and your customer as they advance through our 3-Step-Process.

d. 3rd Project = IncentiFind wants the Affiliate to drive our 3-Step-Process

- i. IncentiFind recommends that you lead your customer in filling out their SEARCH Survey by using your Custom URL.
- ii. IncentiFind will assist both you and your customer as they advance through our 3-Step-Process.
- iii. IncentiFind is proud to say that past our Affiliate's 3rd project, most are able to use our platform with ease. This doesn't mean that we are not here to offer assistance. Always reach out for help by contacting us.

5. Commissions

- a. Commissions will be paid to the Affiliate immediately upon the purchase of VERIFY Report.
 - i. You must register as an Affiliate (<https://search.incentifind.com/affiliate-program>)
 - ii. You must set-up StripeConnect
 - 1. StripeConnect pays commissions automatically when customers purchase our VERIFY Reports via credit card.

2. StripeConnect pays commissions to any account you choose as an Affiliate.

a. If you choose your personal account, please enter your social security number in place of EIN. Please enter our first and last name in place of your company name.

b. If you choose your company bank account, please enter the company EIN and name. Also, if there are multiple Affiliates receiving commissions for the same company, use the same company EIN and name. All commissions will arrive at the appropriate company bank account.

b. Affiliates will be paid within 90 days of receipt of the rebate incentives, AND after the owner has received their 75% of the rebate.

c. It is important that you review our Affiliate Setup Checklist to ensure all commissions are paid promptly and to the appropriate account.

6. Affiliate Dashboard

a. You can track not only your commission per customer and per project on your “Project Page”, but also you can see (in one place) how your customers are progressing through our 3-Step-Process.

COMMISSIONS ON THE SALE OF PRODUCTS

PRODUCTS

Product Name	Which Step In Our Process Does this Exist?	Who is the Customer?	Fee to Customer	Are commissions available on the product?	Who receives commissions ?	How much are commissions ?
VERIFY Report Commercial	After STEP 01 SEARCH is completed	Either: <ul style="list-style-type: none"> • Property Owner • Affiliate • Affiliate Green 	\$500	Yes	<ul style="list-style-type: none"> • Affiliates Basic Tier • Affiliates Green Tier 	<ul style="list-style-type: none"> • Affiliates = \$150 • Affiliates Green = \$250
Portfolio Review Report	After STEP 01 SEARCH is completed	Either: <ul style="list-style-type: none"> • Property Owner/ Corporation • Affiliate • Affiliate Green 	\$500 per building/asset = for 1 - 4 buildings \$250 per building/asset = for 5-25 buildings \$200 per building/asset = for 26-50 buildings \$150 per building/asset = for 51 - 100 \$100 per building/asset = for 101 +	Yes	<ul style="list-style-type: none"> • Affiliates Basic Tier • Affiliates Green Tier 	<ul style="list-style-type: none"> • Affiliates = \$150 per building/asset = for 1 - 4 buildings • Affiliates = \$75 per building/asset = for 5-25 buildings • Affiliates = \$60 per building/asset = for 26-50 buildings • Affiliates = \$45 per building/asset = for 51 - 100 • Affiliates = \$30 per building/asset = for 101 + • Affiliates Green

						<p>\$250 per building/ asset = for 1 - 4 buildings</p> <p>\$125 per building/ asset = for 5-25 buildings</p> <p>\$100 per building/ asset = for 26-50 buildings</p> <p>\$75 per building/ asset = for 51 - 100</p> <p>\$50 per building/ asset = for 101 +</p>
Campus Report	After STEP 01 SEARCH is completed	<p>Either:</p> <ul style="list-style-type: none"> Property Owner/ Corporation Affiliate Affiliate Green 	<p>\$500 per building/ asset = for 1 - 4 buildings</p> <p>Above 4 buildings see Portfolio Review Pricing</p>	Yes	<ul style="list-style-type: none"> Affiliates Basic Tier Affiliates Green Tier 	<ul style="list-style-type: none"> Affiliates = See Portfolio Pricing Affiliates Green = See Portfolio Pricing
Multi-Building Development	After STEP 01 SEARCH is completed	<p>Either:</p> <ul style="list-style-type: none"> Property Owner/ Corporation Affiliate Affiliate Green 	<p>\$500 per building/ asset = for 1 - 4 buildings</p> <p>Above 4 buildings see Portfolio Review Pricing</p>	Yes	<ul style="list-style-type: none"> Affiliates Basic Tier Affiliates Green Tier 	<ul style="list-style-type: none"> Affiliates = See Portfolio Pricing Affiliates Green = See Portfolio Pricing
Master Planned Community Report	After STEP 01 SEARCH is completed	<p>Either:</p> <ul style="list-style-type: none"> Property Owner/ Developer 	<p>\$25 per home = for 2 - 99 homes</p> <p>\$20 per</p>	Yes	<ul style="list-style-type: none"> Affiliates Basic Tier Affiliates Green Tier 	<ul style="list-style-type: none"> Affiliates = \$7.5 per home = for 2 - 99 homes

		<ul style="list-style-type: none"> • Affiliate • Affiliate Green 	<p>home = for 100-199 homes</p> <p>\$15 per home = for 200 - 299 homes</p> <p>\$10 per home = for 300-499 homes</p> <p>\$5 per home = for 500+ homes</p>			<p>\$6 per home = for 100-199 homes</p> <p>\$4.5 per home = for 200 - 299 homes</p> <p>\$3 per home = for 300-499 homes</p> <p>\$1.5 per home = for 500+ homes</p> <ul style="list-style-type: none"> • Affiliates Green = <p>\$12.50 per home = for 2 - 99 homes</p> <p>\$10 per home = for 100-199 homes</p> <p>\$7.5 per home = for 200 - 299 homes</p> <p>\$5 per home = for 300-499 homes</p> <p>\$2.50 per home = for 500+ homes</p>
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COMMISSIONS ON THE SALE OF SERVICES

SERVICES

Service Name	Which Step In Our Process Does this Exist?	Who is the Customer?	Fee to Customer	Are commissions available on the product?	Who receives commissions?	How much are commissions?
APPLY Services	After STEP 02 VERIFY is completed	<ul style="list-style-type: none"> • Property Owner/ Corporation • Affiliate • Affiliate Green 	25% contingency fee for each rebate successfully captured	Yes	<ul style="list-style-type: none"> • Affiliates Basic Tier • Affiliates Green Tier 	<ul style="list-style-type: none"> • Affiliates = 5% of our 25% • Affiliates Green 12.5% or our 25%

AFFILIATE CHECKLIST

- ___ Registration complete by all Company/ Firm sales team members
- ___ StripeConnect setup on all registered accounts
- ___ 1st Project: Ensure your customer completes our Satisfaction Survey
- ___ Customer/ Company / Firm Point of Contact is established
- ___ NDA/ CA executed and in 660 Folder
- ___ W9 received from Customer/ Company / Firm
- ___ Email sent connecting CEO (Natalie Goodman) to Customer/ Company / Firm accounting division to receive commissions from APPLY Services (these cannot be sent through Stripe Connect)