Laura A. Solla

Prospect Research & Development Strategies
173 Washington Street
Freeport, PA 16229
Phone: (724)295-0679
E-Mail: Solla@ResearchProspects.com

ResearchProspects.com

Custom Prospect Profiling and Wealth Assessment Services

In-House Staff Training Sessions:
Internet & Research Using the Internet
Prospect Research Strategies
Prospect Management Strategies

"The Guide to Prospect Research & Prospect Management"

"The Guide to Analyzing Wealth and Assets"

"The Guide to Internet Sites"

Reduce Your Research Costs By Establishing An Account

Consider "establishing an account" and locking in a discount rate of $45/hour as your _permanent rate for research._

It's a fact - research costs are constantly rising. Over the past three years, rates for commercial services rose nearly 50%. These tools are critical to provide you with the highest quality research in a time-efficient manner.

WHAT IS AN "ACCOUNT," AND WHAT ARE THE BENEFITS?

- In essence, you are paying ahead for a predetermined amount of research time _at the 2006 discounted rate of $45/hour._ This rate is guaranteed throughout 2009 as long as you have a current account.
- By establishing an account, you can greatly minimize the administrative headache of coordinating invoices for payment, paying a substantially higher fee for important rush work, and/or paying at a higher fee if the discount deadline is missed.
- Your account time never expires. If you have a "balance" at the end of the month, the research time is carried over and available for the next month's use.
- You will receive a statement at the end of each month that clearly indicates your beginning account balance, each prospect researched during the month and the coordinating amount of time, and the balance left in your account.
- You may also place a "lump sum" amount in your account, and utilize those funds over the coming months.

OK, HOW DO WE GET STARTED?

- First, think carefully about your research needs over the coming months. How many prospects do you think you will research during an average month - 3, 5, 10, 20, etc. Also think about the type of research you may need – full profiles, philanthropy/wealth, philanthropy/boards/wealth, or a mixture of services. If you need assistance in the planning process, just call my office at 724-295-0679 to discuss.

- Next, using the chart below as a guideline, determine the account level that best matches your needs.

  Remember: Your time never expires; you can carry over unused hours to the next month, or for several months. <u>However,</u> if you go over your account allotment, you will be billed at the regular 2007 rates and terms.

<table>
<tr><th>Monthly Account Level</th><th>Research Time*</th><th>Profile Production Time</th></tr>
<tr><td>$500</td><td>11 hours of research time</td><td rowspan="4">• Full Profile: 5.0 hours (average)
• Boards/Philanthropy/Wealth Assessment: 4.0 hours (average)
• Philanthropy/Wealth Assessment: 3.0 hours (average)
• Also available: Prospect identification and qualification services.</td></tr>
<tr><td>$1,000</td><td>22 hours of research time</td></tr>
<tr><td>$1,500</td><td>33 hours of research time</td></tr>
<tr><td>$2,000</td><td>44 hours of research time</td></tr>
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** Does not include shipping fees. Shipping of hardcopy profiles and back-up research documentation will be deducted from the account balance.*

HOW DOES THE BILLING PROCESS WORK?

- Once you establish your "Account Level," you will be billed on or about the 1st of each month for the following month's account fee, i.e. January 1 billing covers February research, etc. The invoice is due within 15 days of invoice date.
- Thereafter, you will be billed each month on the 1st of the month at the predetermined Account Level until you change, suspend, or cancel your account.
- You may also select to place a "lump sum" in your account, which is available on an on-going basis. When your account gets low, you can add more money if you plan to do more research.
- At the end of each month you will receive a detailed statement covering your account activity for the prior month.
- If you do not use all of your research time during the month, your time will be carried over to the next month, and reflected as a "credit" on your next month's statement. You can accrue as much time as you like.

- You can place your account on hold if you do not plan to do any research for awhile, or adjust your Account Level rate as needed.
- Important: If you go over your account level allotment, you will be billed the additional time at the end of the month at the regular rates and corresponding terms, which is $50/hour discount if paid within 15 days, $70/hour for any rush work or invoices paid after 15 days.

WHAT IF OUR NEEDS CHANGE?

- The only thing constant is change! Your account is custom tailored to your needs and your time never expires!
- For example, as your campaign revs up, you may find you need to increase your Account Level for the next few months. Conversely, you may be nearing the end of your campaign or project and find yourself starting to slow down and need to lower your Account Level. You can change your Account Level at any time prior to the next billing cycle.
- You can also stop your account at any time. Again, your accumulated time does not expire. You can use those hours any time during the next 12 months. If you stop your account and have a balance due, you will be billed according to the 2007 rates and terms.
- Research time is non-refundable.