🔒 **SAMPLE OFFER** — illustrative scope and list pricing for a fictional client. Not a quote and not an offer to contract.

MA

Real Estate Investing & Finance Suite

Sample offer & scope · Million Automations · prepared for **Real Estate Investors Holding Co** (fictional sample client)

SAMPLE · NOT A QUOTE

> One connected stack for people who own, operate and raise capital on property. You are not buying seven tools that need integrating — deal sourcing, the operating hub, the investor portal, the books, the tax position and both sides of credit are one system, which is why the same figure reconciles across all of them. Most products below are live and clickable right now as a demo, with sample data throughout.

What each product actually does

Most products below are live and clickable as a demo — no login. Where there is no demo link, the product is login-gated or tied to live connected accounts, and we say so on the block rather than leaving you to wonder. The bullets are the delivered scope, not a roadmap.

🎯 Lead Machine — deal & lead engine

try the demo →

Target in, underwritten opportunity out — across four asset classes: small-business M&A, commercial real estate, residential, and other assets (vehicles, boats, aircraft, equipment, premium appliances). A fifth, customize-for-your-business path skins the same engine for whatever you buy or sell, on our managed CRM or yours.

- **Small-business M&A** — entity registry, licence and UCC records, earnings normalisation (SDE with add-backs), then SBA vs seller-financed vs all-cash reads with DSCR; succession signals (owner age, lapsed licences, expiring leases) for off-market sourcing
- **Commercial RE** — rent roll and recorded-debt read, loan-maturity sourcing, then assumption vs core vs value-add reads; the maturity schedule is the distress list
- **Residential** — address → owner, APN, liens, estimated debt and PITI, equity position
- **Other assets** — VIN/hull/tail-number record pulls, sold-comp bands, flip vs consign vs arbitrage reads, and liquidation signals (estate sales, storage and marina liens, lapsed registrations)
- **Customize** — your asset class as configuration: deals live as custom objects in your managed CRM sub-account (or push to the CRM you already run via API), with the underwriting math in the automation layer
- Per-class sweeps of the on-market and listing feeds matching your buy box, scored by the same underwriting read
- Distress signals — foreclosure, probate, tax delinquency, receiverships — for off-market sourcing
- Contact enrichment and list building: owner mailing address, emails and phones where lawfully available, with saved filters for outreach
- Comparables and multiples behind every read — sale comps, rent comps or transaction multiples, depending on the class
- Feeds qualified opportunities straight into the CRM pipeline

HOW IT COMPARES

	MILLION AUTOMATIONS (MANAGED)	LIST & SKIP-TRACE DATA PLATFORMS	YOU OWN THE BUILD
Monthly	$297/mo — no per-lead data fees	$71–449/mo by tier, plus per-record skip and list fees (~$0.10–0.15) on entry plans	~$12,000–20,000 build + ~$1,800–4,000/yr; you maintain the county-data pipeline
Underwriting	An instant cash / creative / traditional read	Raw data — you model the deal yourself	Same engine — keeping the model current is yours

🌐 Custom site + SEO & analytics

✦ FOUNDING OFFER — BUILD FREE

A credibility-first marketing site engineered to convert visitors into captured leads — and to rank.

> No public demo here — the live examples ARE the demo: Phở 32 and M&C Repair on the demo hub are sites built exactly this way.

> **Founding offer, through 30 September 2026:** the $147 build fee on your first site is waived — the site is built free and you pay only the $297/month managed fee. One site per client; additional sites at the usual $147 each. We may withdraw or change this promotion at any time, and it does not apply to engagements already quoted.

- Custom-designed brochure site on domains you already control, built to showcase the flips, the developments and the track record
- Brokerage ID and licence numbers built into the footer for state real-estate compliance
- SEO and analytics built in — GA4, Search Console, on-page and technical SEO, local SEO (business profile, schema, local keywords)
- A visitor and lead analytics dashboard, plus a monthly performance report covering traffic, sources, leads and rankings

- Lead intake wired straight into the CRM — every inquiry captured, tagged and routed
- Your sites are portable — you may port a custom site out at any time; it is yours to take

HOW IT COMPARES

	MILLION AUTOMATIONS (MANAGED)	PREMIUM RE WEB PLATFORMS (E.G. LUXURY PRESENCE)	YOU OWN THE BUILD
First-year cost	Build free through 30 Sep 2026 (normally $147) + $297/mo — month-to-month, portable	$3,500–5,000 setup + $300–800/mo on a 12-month contract, a true first year of $7,100+	~$16,000–23,000 build (site + Front Desk) + ~$2,400–4,600/yr maintenance
SEO	Bundled — on-page, technical and local	A paid upsell at higher tiers	You hire and manage your own
Ownership & hosting	Managed and secured; you own your data and can port the site out	You own nothing and are locked to their platform	You own code and data, and host, secure and insure it yourself
Lead capture	Wired into your CRM	Not included	Built once; you maintain the integrations

🤖 AI Front Desk

A trained chatbot and a 24/7 voice receptionist — per domain.

> No public demo on this block — a voice receptionist has to be phoned to be judged. The Phở 32 and M&C Repair sites carry the chat half, and we dial the voice half live on a call.

- A website chatbot that answers with cited, grounded answers — it says "I don't know" rather than inventing one
- A 24/7 AI voice receptionist that answers the phone and books appointments
- Each brand gets its own trained knowledge base, persona, phone line and retraining — the platform is shared, the brain is not
- AI usage metered separately at cost and itemised, so you pay for what your customers actually use

👥 Managed CRM 🔐

The pipeline the raise and the brokerage both run on.

- A dedicated managed sub-account per brand, built as a real pipeline — prospect → conversation → soft commit → docs out → funds wired
- Email and SMS nurture sequences, shared inbox, cross-brand journeys
- Keep the CRM you already have instead: we wire the site intake and pipelines into it and monitor lead flow — no forced migration
- Additive either way — your existing CRM keeps running until anything new is verified. No data lost.

> No public demo on this one: a CRM is a logged-in system holding real contact records, so there is nothing safe to publish. We walk it live on a screen-share instead, and can show a sanitized sub-account on request.

HOW IT COMPARES

	MILLION AUTOMATIONS (MANAGED)	FOLLOW UP BOSS · LOFTY	YOU OWN THE BUILD
Monthly	$179/mo per brand fully managed — or $79/mo to wire and monitor the CRM you already have	Follow Up Boss ~$499/mo; Lofty retail ~$449–1,500/mo	A CRM platform cannot be bought outright — these are SaaS. Owning one means building one.
Setup & upkeep	We configure, automate and maintain it	You configure, import and maintain it yourself	You staff admin, automations and deliverability yourself

🏠 Real Estate Ops 🔐 try the demo →

One cockpit for both sides of the business — the flips and the holds.

- **Fix & Flip view** — rehab budget vs actual by line, draw schedule with inspection status and receipts, days held, ARV, projected vs realized margin
- **Buy & Hold view** — rent roll, occupancy, NOI, cap rate, debt service, cash flow, equity and value trend per property
- Leases — terms, renewal windows, deposits, status, and the signed PDF in a private vault
- Occupancy calendar consolidating bookings across channels
- Receipts and documents captured against transactions
- Warranties with coverage terms, claim filing and service-fee tracking
- Listing consistency — for-sale listings syndicate from the MLS to the major portals; rentals push to feed-accepting portals, with periodic spot-checks flagging listings that drift out of sync (best-effort: portals expose no status API)
- Reviews and marketing performance per channel, with an action centre of what needs attention

HOW IT COMPARES

	MILLION AUTOMATIONS (MANAGED)	BUILDIUM · DOORLOOP · APPFOLIO	YOU OWN THE BUILD
Monthly	$349/mo to 10 doors · $649/mo to 20 · then $25/door	Buildium Premium ~$400/mo (software only) + ACH fees; DoorLoop Pro ~$139/mo (first 20 units), then ~$1.50/unit	~$27,000–42,000 build + ~$4,000–8,400/yr maintenance and hosting
Flip + hold in one view	Fix & Flip and Buy & Hold together	Rentals only — no flip view	Same cockpit — you maintain it
Delivery	Built, configured and managed for you, with cover placed at engagement start	You configure and run it yourself	Built once and handed over; you run it and insure the tenant records
Rent/deposit collection	Included	Add-on plus per-transaction fees	Included in the build; the payment account stays yours either way

💳 Rent & deposit collection

Included with Real Estate Ops, or standalone.

> No separate demo — this lives inside Real Estate Ops, where the rent and deposit links appear on the lease and unit records.

- Tenants pay rent and deposits through a secure link — no logins and no stored tenant records
- Rent links per unit or tenant; deposit pre-authorisation, capture and release; damage-charge handling
- Money settles to your own payment account and directly into your bank — we never hold, route or control the funds

💼 Investor Portal 🔐 SECURE DATA TIER try the demo →

A private, login-gated portal where each investor sees only their own position.

- Per-investor secure login with MFA — investor A never sees investor B's documents
- Institutional performance per position: net IRR, equity multiple (TVPI/MOIC), cash-on-cash, preferred-return accrual, distributions, remaining balance, per-deal status
- Per-deal drill-downs — timeline, cash-flow history, budget-vs-actual with over/under tags, photos, scoped documents
- Document signing with a full audit trail, plus a private contract vault
- Secure delivery of sponsor-provided K-1s and statements, prepared by the fund's own tax professional
- Every investor-facing figure stamped "data provided by the fund manager", approved on staging before investors see it
- Notifications for new documents, distributions and signature requests

HOW IT COMPARES

	MILLION AUTOMATIONS (MANAGED)	APPFOLIO INVESTMENT MANAGER · JUNIPER SQUARE	YOU OWN THE BUILD
Monthly	$649/mo, 6 seats included (+$50/seat)	AppFolio Investment Manager ~$650/mo self-serve; Juniper Square $1,000–1,500+/mo	~$53,000–83,000 build + ~$8,000–16,600/yr maintenance, hosting and dev resource
Security & insurance	Managed — Cyber/E&O on investor PII is quoted and placed at engagement start, carried by us from then on	Self-serve — you buy your own cyber cover on accredited-investor PII	You are the data controller — you buy Cyber + E&O and run your own security
Fit	Custom-built around your raise	You configure and administer it	Custom-built, then you operate and evolve it

📈 Fund Manager back office 🔐 try the demo →

The raise, run from one screen.

- Raise KPIs — total raised, committed-but-not-wired, active investors, average position
- Investor roster with capital-account roll-forward per investor
- Document board by status — sent, viewed, signed, countersigned — with reminder sending
- Distribution runs: pro-rata split calculated per investor, previewed, then posted
- Prospect pipeline by stage, from first conversation to wired

📚 Finance HQ 🔐 try the demo →

Multi-entity books that consolidate properly.

- A book per entity plus a true group view, switchable
- Group P&L with an eliminations column and a consolidated line — intercompany revenue does not inflate the group
- Intercompany match-board pairing both sides of every internal charge and flagging what will not pair

- Cash position across every book, and composition by entity
- Period register per month with drill-down to the transaction
- An 11-gate clean-books close checklist showing exactly which gate is blocking

🧮 Tax Center try the demo →

Plan forward, recover backward, reconcile always. Planning software — not a tax return and not advice.

- Federal and state liability shown separately and never blended, with a filing countdown
- A grade and a path-to-zero waterfall showing what each step removes
- Strategy levers by risk tier — established, aggressive, advanced — each with its federal/state split, mechanics, and the attestations you are making
- Evidence-gated positions (for example short-term-rental material participation) that will not count without the contemporaneous log that defends them
- Amend finder — prior years compared filed-vs-corrected at line level, with the refund split by jurisdiction and the statute window
- Reconciliation queue for commingled purchases, classified by entity, so the books arrive tax-ready
- Mileage-method decision support — standard rate vs actual expense, with the one-method-per-year constraint made explicit

📊 Credit OS PERSONAL CREDIT — SEPARATE PRODUCT LINE try the demo →

A personal-credit cockpit for the operator behind the entities. Not credit repair, and no score promises.

- Tri-bureau score tracking with change detection — a new inquiry, tradeline or derogatory raises an alert
- Loan-specific credit lens — auto, mortgage, card and free-app scores are different models on different ranges (auto and bankcard run 250–900; mortgages still use the older FICO 2/4/5 trio with a middle-score rule); the tab shows the same file through each ruler
- Utilization, mix, age and derogatory factors broken out, with the tradelines behind each
- Cross-bureau deduplication so one account reported by three bureaus counts once, not three times
- A sequenced roadmap with goal tracking toward a target score
- Dispute tracking for items you choose to dispute yourself, under your own FCRA rights — we file nothing on your behalf and alter no bureau record

> Credit OS sits beside the real-estate suite rather than inside it: personal credit is a different regulatory posture to business credit. It is informational software — it is not credit repair, not a credit-repair organisation service, and it makes no representation that any score will change.

🏦 Business Credit try the demo →

Preparation, not prediction. Nothing here is credit repair or a score guarantee.

- A bureau file per entity — DUNS, profile facts, age, filings
- Tradelines with payment performance, balances and utilization against the comfort ceiling
- Paydex and payment-index tracking where the entity's subscription tier exposes it
- Funding-readiness score per company, broken into the gates a lender actually checks
- Data-quality flags — for example an industry code the bureau auto-assigned wrongly, which quietly narrows the programmes the file is matched against
- Free-tier vs monitored-tier comparison so you can see what a subscription would reveal before buying one

📣 Marketing engine 🔐

Your own deal flow, turned into content, across up to 11 channels. Two delivery options — you pick the one that fits your stack.

- **Option A — inside your CRM.** Scheduling and publishing run in the managed GoHighLevel sub-account you already have, so content, pipeline and conversations live in one place and nothing new needs logging into.
- **Option B — self-hosted (Postiz).** We host an open-source scheduler on our infrastructure under your brand. Costs nothing per seat, keeps the channel connections and post history portable, and is the right answer if you are not on our CRM or want the content stack to survive changing CRMs.
- Google Business Profile · Facebook · Instagram · LinkedIn · X · TikTok · YouTube Shorts · Pinterest · Threads · Bluesky · Mastodon — plus email
- Driven by your listings and deal flow rather than generic filler
- Quality-gated and on-brand — you approve before anything publishes

No public demo yet — publishing surfaces are tied to live connected channels. Walked live on a screen-share; a recorded walkthrough is coming.

HOW IT COMPARES

	MILLION AUTOMATIONS (MANAGED)	DONE-FOR-YOU SOCIAL/CONTENT AGENCIES	YOU OWN THE BUILD
Monthly	$297–497/mo — up to 11 channels plus email, driven by your own deal flow	$1,000–3,000+/mo, fewer channels, generic content	~$15,000–24,000 build + ~$2,300–4,800/yr; you hold and maintain the channel integrations

Pricing — list rates, July 2026

These are list rates as of July 2026 and are indicative only. They are not a quote and not held open. When you apply we scope your actual door count, investor seats, entity count and integrations, and issue a fresh written quote — that quote is the one that binds, and it may differ from the figures below. Pricing, packaging and availability change over time.

Setup is one-time. Monthly is all-in managed: hosting, monitoring, backups, patching, support and changes under SLA. 🔐 SECURE DATA TIER marks products that store investor or tenant records and therefore carry Tech E&O and Cyber cover.

PRODUCT	SETUP	MONTHLY
Lead Machine County-records ingestion, underwriting engine, CRM feed. Optional elective flat license of $2,000 per closed acquisition in place of the monthly.	included	$297 + usage
Custom site + SEO + analytics ✦ FOUNDING OFFER Per brand. **First site built free through 30 September 2026** — the $147 build fee is waived. Additional sites $147 each.	~~$147~~ $0	$297
AI Front Desk Trained chatbot + 24/7 voice receptionist, per domain. AI usage metered and itemized.	$197	$297 + usage
Managed CRM 🔐 Per brand, fully administered. Or we wire and monitor the CRM you already use, at $350 setup / $79 per month.	$499	$179
Real Estate Ops 🔐 Fix-and-flip plus buy-and-hold cockpits. Rent and deposit payment links included.	$997	$349 to 10 doors · $649 to 20 · +$25/door beyond
Rent + deposit links — standalone Only if you are not taking Real Estate Ops, which includes them.	$197	$99
Investor Portal 🔐 Dashboards, e-sign, document vault, secure logins. Includes 6 investor seats. +$50 per additional seat · +$99 per additional fund or LLC entity.	$997	$649
Marketing engine 🔐 Deal-flow to content pipeline across up to 11 channels. Optional.	included	$297 – $497
Investor Portal — Fund Manager back office 🔐 The raise, roster, document board and distribution runs. Included with the Investor Portal — not sold separately.	included	included
Finance HQ 🔐 Multi-entity books with eliminations, close checklist and the reconciliation queue. Priced per book: 2 entities included, +$79 per additional entity.	$997	$449
Tax Center Planning cockpit, amend finder and the commingled-expense queue. Reads the Finance HQ books, so it is taken alongside them.	$697	$299

PRODUCT	SETUP	MONTHLY
Business Credit Per-entity bureau file, tradelines and funding readiness. 3 entities included, +$49 per additional entity.	$497	$199
Credit OS SEPARATE PRODUCT LINE Personal credit for the operator behind the entities. Sold beside the suite, not inside it.	$297	$99

Payments run through Stripe on **your** Stripe account — we never take custody of your funds, and the merchant relationship stays yours whether or not you stay with us. SMS, email, voice and AI usage are metered at cost and itemized separately, never bundled into a vague "platform fee".

A worked example

A capital raiser with one brand, a 12-door portfolio and an active raise — the most common shape.

LINE	SETUP	MONTHLY
Custom site + SEO + analytics ✦ FOUNDING OFFER	~~$147~~ $0	$297
AI Front Desk	$197	$297
Managed CRM — one brand	$499	$179
Real Estate Ops — 12 doors	$997	$649
Investor Portal — 6 seats included	$997	$649
Example total	**~~$2,837~~ $2,690**	**$2,071 / mo**

Illustrative only. Your number depends on door count, investor seats, entity count and which products you take — the blocks above are priced individually so you can start with one and add later.

Changes after launch

Flat-priced buckets with a turnaround commitment. You approve the size before any work starts, and everything ships through staging.

SIZE	PRICE	TURNAROUND
XS — one element: a phone number, a price, a photo, a link, a button label	$25	1–2 business days
S — a small change: a bio card, a form field, a content block, a restyle	$50	1–2 days
M — a small feature: a template page, a CRM-wired form, an automation branch	$150	2–4 days
L — a new capability: a custom page, a multi-step workflow, a portal view	$400	5–7 days
XL — a new module or product	from ~$800, quoted	scoped first

A typical agency bills $100–175 per hour with a one-hour minimum, so a five-minute change costs a full hour. Here it is an XS.

Managed, or build it yourself

Both are legitimate. They are different businesses to be in, and the difference is mostly about who carries the risk. The build column sums the per-product "you own the build" figures quoted alongside each product above, so the two views reconcile.

	MANAGED (THIS OFFER)	YOU OWN THE BUILD
Up front	~$2,700 setup (founding offer)	$123,000 – $192,000
Ongoing	predictable monthly, all-in	$18,500 – $38,400 / yr, your problem
Maintenance, uptime, patching	us, under SLA	your team or contractors
Breach and PII liability	ours — $1M Tech E&O + $1M Cyber, quoted in writing and placed at engagement start	yours, as the data controller
If we go away	source escrow release + perpetual licence	you hold the code (and need a team)
Indicative 5-year total	**~$87,000 – $175,000**	**~$215,500 – $384,000**

> The managed monthly is affordable precisely *because* the build cost amortises across many clients. Ownership at subscription prices is not a thing anyone can honestly sell — the two columns are a real choice, not a trick.

What the monthly actually covers

INCLUDED EVERY MONTH

- Hosting, monitoring, backups and incident response
- Security patching and dependency upkeep
- Uptime target: 99.9% on Secure Data Tier products, 99% on presence sites, measured by an external monitor
- Configuration changes — branding, domains, content, fields, pipelines, dashboard metrics, seats — usually same week
- One accountable operator, not a ticket queue

PRICED SEPARATELY, ALWAYS ITEMISED

- SMS, email, voice and AI usage — metered at cost
- Enhancements beyond configuration — the XS–XL buckets above
- Third-party platform fees you hold directly (Stripe processing, ad spend)
- New modules or products — scoped and quoted before any work

> Uptime targets exclude scheduled maintenance and upstream outages outside our control — payment processors, DNS and CDN providers, and telecom carriers.

Insurance, data ownership & breach liability

Cover is right-sized per product rather than sold as one blanket line — you should not pay a cyber premium on a brochure site, and you should never run an investor portal without one.

PRODUCT TIER	COVER CARRIED
Secure Data Tier 🔐 Investor Portal, Real Estate Ops, managed CRM, marketing engine — anything holding investor or tenant records, subscription agreements, K-1s or banking details.	$1M Technology E&O + $1M Cyber, plus Contractual Privacy Breach Costs. **Quoted in writing; placed and bound at engagement start, before any regulated personal data is handled.** Cover is arranged per engagement rather than carried as a standing policy, so it is not in force until your engagement begins.
Presence tier Marketing site, lead forms, rent and deposit payment links.	General Liability. A site and a lead form hold names and emails, not regulated PII, so no Tech E&O or Cyber premium is loaded onto the price. Payment links carry no cyber premium either — the payment processor is the PCI processor and no tenant records are stored.

WHO CARRIES WHAT

IF SOMETHING GOES WRONG

- **We carry the vendor-side breach liability** on the platform we host, secure and maintain. That is what makes the promise insurable rather than a sentence in a brochure.
- **You own 100% of your data** — leads, investors, contracts, tenants — with full export on request, at any time.
- **Payments never touch us.** Rent, deposits and distributions settle to your own payment account and into your own bank. We never hold, route or control your funds.
- If you instead buy the build outright, **you become the data controller** and carry your own Cyber and E&O on investor and tenant PII.

- Platforms are monitored 24/7 with automated alerting; incidents route to a named human, not a queue.
- Source for Secure Data Tier products is placed under an escrow or equivalent deposit arrangement at engagement start — the mechanism is finalised with counsel as part of contracting — released to you if we become insolvent, dissolve, stop operating the platform, or materially breach without cure.
- You hold a perpetual licence to run the platform, including a licence to the escrowed source on any release event.
- We warrant non-infringement and indemnify you for third-party IP claims arising from the delivered platform, subject to the caps in the signed agreement.
- On any wind-down: full data export plus wind-down assistance, written into the contract.

> Cover is quoted in writing, then placed and bound at engagement start and evidenced by certificate on request — it is arranged per engagement, not carried as a standing policy, so no policy is in force before an engagement begins. Nothing on this page is a certificate of insurance or evidence of cover, and the policy wording governs — including its exclusions and caps.

How we build and support it

Every change flows Dev → QA → Staging → UAT → Production. Nothing reaches your live site, portal or investors without your sign-off at the UAT gate, and staging is a real working copy rather than a screenshot.

SEVERITY	RESPONSE	RESOLUTION TARGET
Critical Site down · portal will not load or login broken · leads stop · a payment fails	monitored 24/7, human response ≤ 2 business hours	restore or workaround, same business day
High A form stops capturing leads · a metric shows the wrong number · an automation stopped	≤ 8 business hours	1–2 days
Normal A typo or broken image · a mislabelled chart · a tag or field set wrong	≤ 1 business day	3–5 days

> **Bug fixes are always free.** A defect in delivered, unmodified functionality is fixed at no charge to the SLA above — defect versus enhancement is determined against the signed scope for that product, not by argument. New work is billable at the flat published bucket sizes, approved by you before anything starts. Response times are the commitment; resolution figures are targets.

Questions we get asked

Who owns the code, and who owns the data?

You own 100% of your data, always, with export on demand. We own and licence the platform — which is precisely why securing, insuring and maintaining it is our responsibility rather than yours. If you want to own the code, that is a different product: a work-for-hire build at build pricing, after which you are the data controller and carry your own cover.

What happens if Million Automations disappears?

You hold a perpetual licence to run the platform, and the Secure Data Tier source is placed in escrow at engagement start (the mechanism is finalised with counsel as part of contracting). Insolvency, dissolution, ceasing to operate the platform, or an uncured material breach are all release events. You also get a full data export and wind-down assistance, written into the contract rather than promised verbally.

Who is liable if there is a data breach?

On the platform we host and manage, we are — to be backed by $1M Technology E&O and $1M Cyber plus Contractual Privacy Breach Costs, quoted in writing and placed at engagement start, before any regulated personal data is handled — arranged per engagement, so not in force beforehand. Cover is placed per engagement, so it is not in force before yours begins. If you buy the build outright, that liability moves to you along with the code.

Do you ever hold our money?

No. Rent, deposits and investor distributions settle directly into your own payment account and your own bank. We never take custody, and the merchant relationship stays yours whether or not you stay with us.

Is the monthly locked in? What if I only want one product?

Every block is priced individually so you can start with one and add later. The figures on this page are July 2026 list rates and are indicative — your binding number comes from a written quote after a scoping call.

What is included in the monthly, and what costs extra?

Included: hosting, monitoring, backups, incident response, security patching, uptime commitments, and configuration changes — branding, domains, content, fields, pipelines, dashboard metrics, seats — usually within the same week. Extra and always itemised: SMS, email, voice and AI usage metered at cost; enhancements beyond configuration at the flat bucket prices; third-party fees you hold directly.

How fast can we go live?

A marketing site is typically days. The AI Front Desk follows about a week later. Operations cockpits configure to your portfolio in two to three weeks. A secure investor portal is a three-to-four week custom build, and it cannot start until the capital-raising entity that will operate it exists — entity formation is usually the real critical path, not the software.

Can we keep the CRM we already use?

Yes. We either run a managed CRM for you, or wire and monitor the one you have at a lower monthly. Neither option is ever free — a managed CRM carries a real platform and administration cost, and anyone telling you otherwise is hiding it somewhere else.

Is the Tax Center tax advice? Is Business Credit credit repair?

No to both, and deliberately so. The Tax Center is planning software that models positions and flags what needs substantiating — your CPA reviews and files. Business Credit is preparation and visibility: it shows what lenders check and what would move a file. It makes no score promises, files no disputes and alters no bureau record.

What are the demos actually showing?

The real products, running the real interfaces, loaded with a fictional portfolio. Every figure across the demos reconciles with the others because it is one system — that is the thing worth checking while you click around.

Next step

Click through the demos first — they are live, and they are the honest version of what you would be buying. Then book a call and we will price your actual door count, seats and entities.

Schedule a call →

This is a sample. Figures are list rates as of **July 2026** for a fictional client, prepared to show how the offer is structured. **Applying does not lock these rates** — every engagement is scoped and re-quoted in writing, and the written quote is the only binding one. This document is not a quote, not an offer to contract, and not financial, tax, legal or investment advice. Every number in the linked demos is fictional sample data. Insurance cover is quoted in writing and placed at engagement start, evidenced by certificate on request; it is arranged per engagement and is not in force beforehand. Competitor names and figures in the comparison tables are the property of their owners, used for factual comparison only, and were taken from those vendors' public pricing pages as of **July 2026** — several publish ranges or quote-only pricing, so check current rates with the vendor. No affiliation or endorsement is implied. Pricing, scope and availability change — the quote you receive after a scoping call is the one that counts.

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