

# No Cost To The Bank

By recommending CalcuTrack as an alternative, you can start experiencing Better Personal Financial Statements at no cost.

## 30-Day Free Trial

Clients can complete and submit their statement within 30 days for free.

### Personal Membership



For people who have no business assets

30 days free

then

\$4.99 / monthly

CONTINUE

### Professional Membership



For people who have business assets

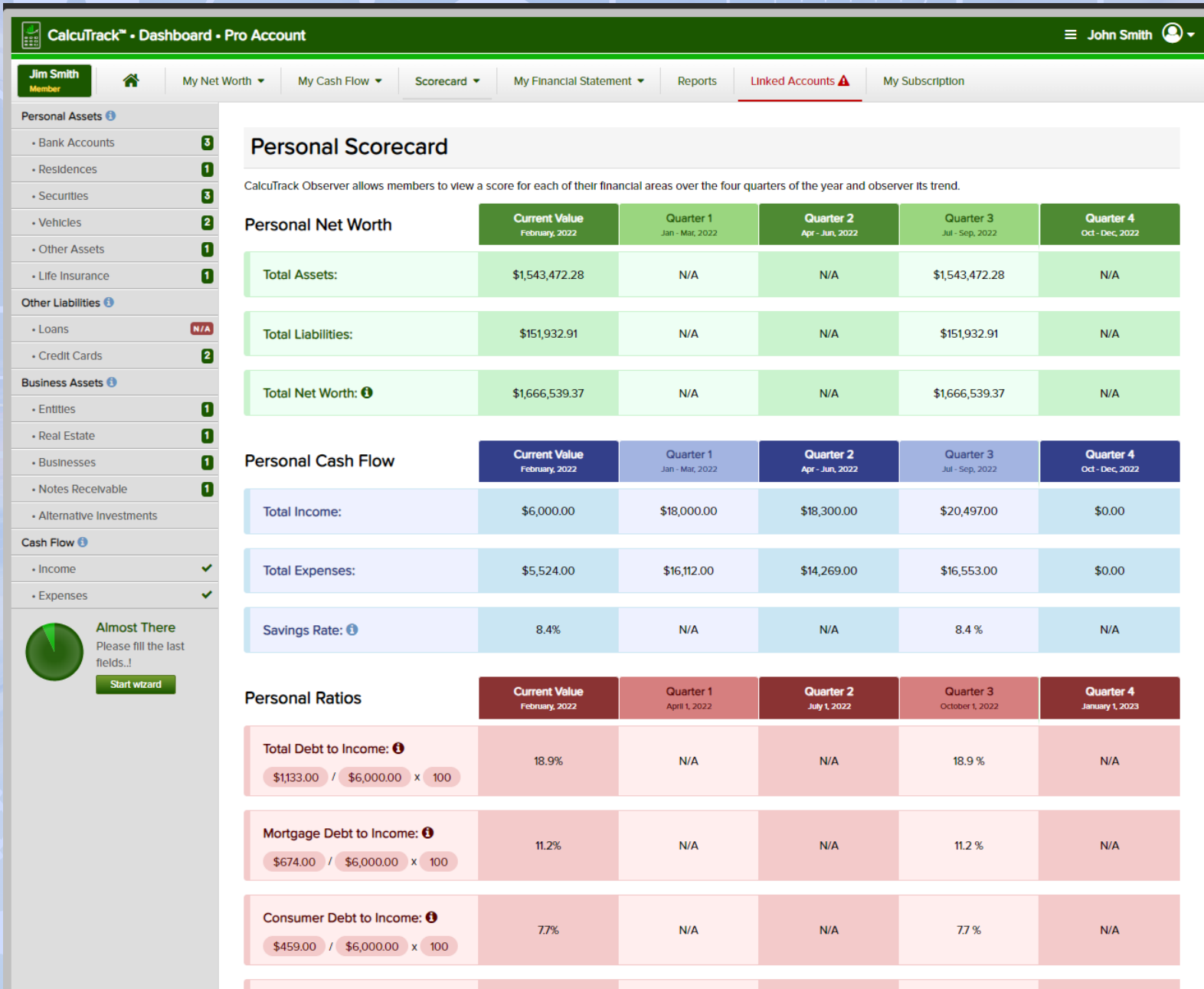
30 days free

then

\$9.99 / monthly

CURRENT TIER

# Scorecard





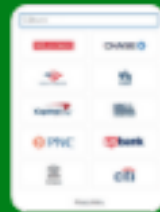
# On-Boarding Wizard

## How To Get Started?

- 1 **Sign-Up**  
to let us assist you  
with a better personal  
financial statement.



- 2 **Link Your Accounts**  
to reduce manual  
entries and get  
automated daily  
balance updates.



- 3 **Use Our Data  
Input Wizard**  
to add more  
information and  
make your financial  
picture complete.



- 4 **Get The Results  
You Deserve**  
and never fill out  
another Personal  
Financial Statement  
again.



## Completion Wizard

[Click here to watch our introductory video](#)

[Learn more about the completion wizard](#)

[Link More Accounts](#)

### Net Worth

Do you want to add:	Existing Accounts	Add New or Additional Accounts	Have None
<b>Personal Assets</b>			
Bank Accounts	5	<input type="checkbox"/> Yes, Add Now	<input type="checkbox"/> Have None
Residences	1	<input type="checkbox"/> Yes, Add Now	<input type="checkbox"/> I have None
Securities	9	<input type="checkbox"/> Yes, Add Now	<input type="checkbox"/> Have None
Vehicles	3	<input type="checkbox"/> Yes, Add Now	<input type="checkbox"/> Have None
Other Assets	1	<input type="checkbox"/> Yes, Add Now	<input type="checkbox"/> Have None
<b>Business Assets</b>			
Entities	2	<input type="checkbox"/> Yes, Add Now	<input type="checkbox"/> Have None
Real Estate	8	<input type="checkbox"/> Yes, Add Now	<input type="checkbox"/> Have None
Businesses	1	<input type="checkbox"/> Yes, Add Now	<input type="checkbox"/> Have None
Notes Receivable	2	<input type="checkbox"/> Yes, Add Now	<input type="checkbox"/> Have None

# Experience our powerful, new, more accurate Personal Financial Statement:

By handing out our brochure  
or business card to your clients

Through a link from the bank's  
website to CalcuTrack's landing page



**A Better Personal Financial Statement**

*Updated and at your fingertips 24/7*

Net Worth Statement  Segregated Entities 

Income Statement  AWS Security 

Signature Line and Date  Integrated Disclosures 

[Sign up ▶](#) [www.Calcutrack.com](http://www.Calcutrack.com)

**CalcuTrack™**  
A BETTER PERSONAL FINANCIAL STATEMENT  
Because Your Wealth Matters

Let us take care of your Personal Financial Statement, so you can focus on growing & managing your wealth

[www.Calcutrack.com](http://www.Calcutrack.com)



We Are Here For You!

## Welcome To CalcuTrack

\*We Are An Independent Company & Are Not Affiliated With Any Financial Institution.\*

**Learn More About Us**

[CalcuTrack Home Page](#)

**Start Your Journey Now**

[Try Out CalcuTrack Now](#)

**Sample Financial Statement**

[Download Free PDF Sample](#)

**We Specialize In Providing You With The Best Personal Financial Statement Possible.**

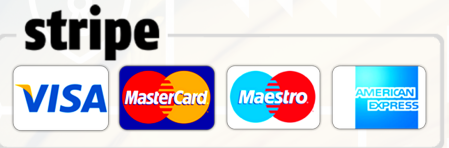
# Our Technology & Team



CalcuTrack is hosted by the most secure hosting environment.



CalcuTrack uses the most advanced technology to link members' accounts to their original source.



CalcuTrack's powerful payment portal internally manages the entire payment experience for our members.

## ***Our team***

**Chris Gredig - Founder**

### ***Development***

**Terry Patrick - Lead Product development**

**Kwamae Mcpherson - Amazon Hosting architect**

**Daniel Aiken - Integration architect**

### ***Sales-Marketing***

**Sami Jarjour, George Jarjour**

### ***Testing & Support***

**Carla Munoz & Monica Jacobs**



# The Most Secure Data Management Practices

- No links to live financial data
- Accounts truncated to 4 digits
- Each member controls all data fields
- No personal identification information  
is required

*\* Data recovery plan, data breach & protection procedure, liability indemnification, professional liability insurance, Amazon hosting architecture, all available upon request*



# Why CalcuTrack?

**Because you and  
your clients  
deserve better!**



- 1 Our lender dashboard with financial ratios facilitates early "go-no-go" decisions
- 2 Help your borrowers succeed with a better Personal Financial Statement
- 3 Improve compliance by reducing associated exceptions
- 4 No cost, no contract, no risk to you or your bank



SCAN ME

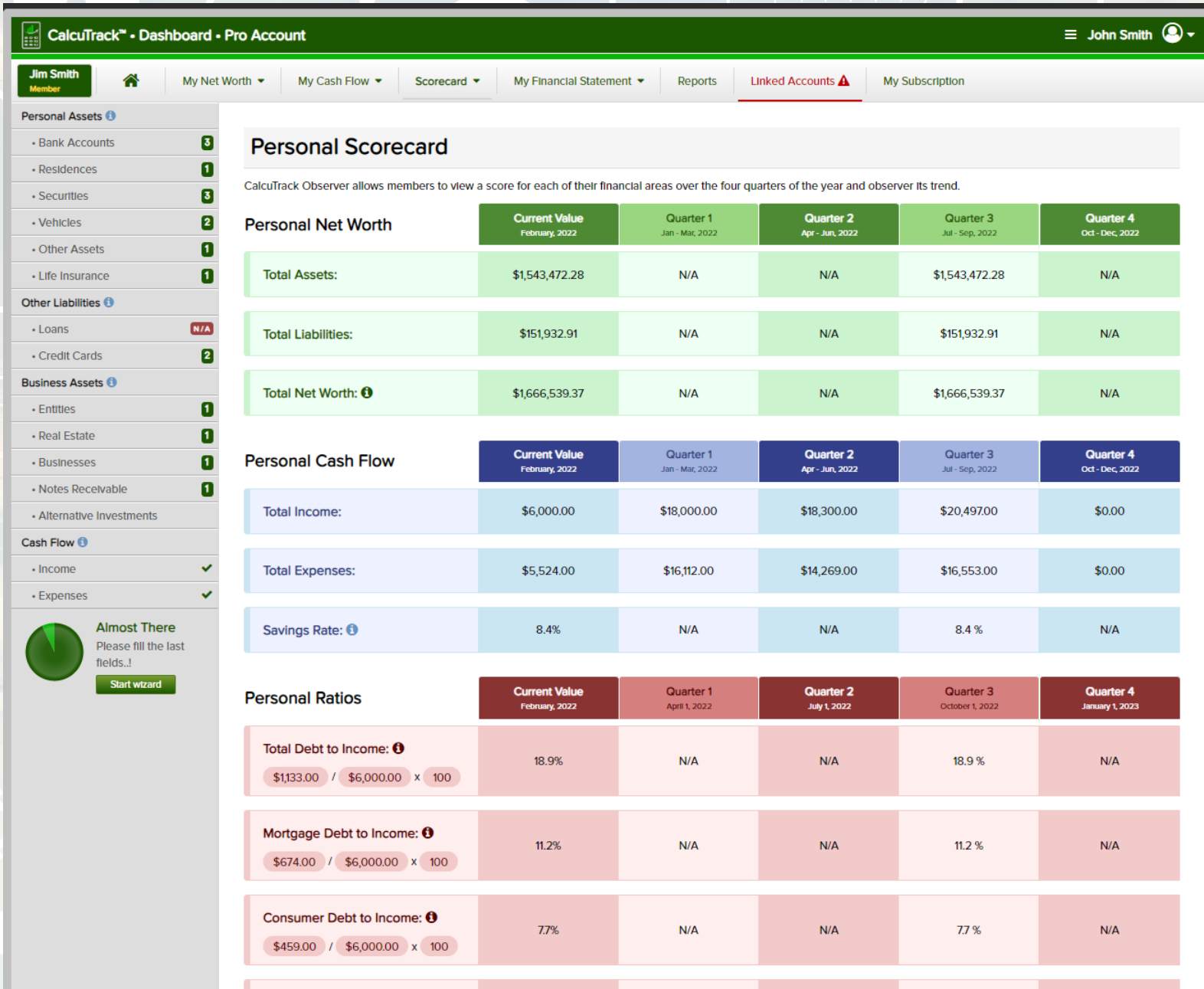


# CalcuTrack

Providing lenders and their clients with more accurate, complete, and consistent Personal Financial Statements that everyone can trust, is easy to create and maintain.




# Personal Scorecard



# Wizzard

## Completion Wizard

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Desktop OneDrive - Personal »



29°F Clear



# Current Enhancements

To improve lender and member experience by focusing on ease of use and improved value deliveries

The ability for borrowers to add a loan request as part of their Personal Financial Statement (Jan. 2023)



# CalcuTrack™

**"With CalcuTrack, the personal financial statement is no longer a creative, worthless, written task that frustrates everyone."**

*- Colorado Lender*





## ***CalcuTrack™***

**Providing lenders and borrowers with a more accurate, complete, and consistent Personal Financial Statement that is easy to create, maintain, and that everyone can trust.**

# A Better Personal Financial Statement

*Easy to create, maintain, and updated 24/7*



**Net Worth  
Statement**



**AWS  
Security**



**Segregated  
Entities**



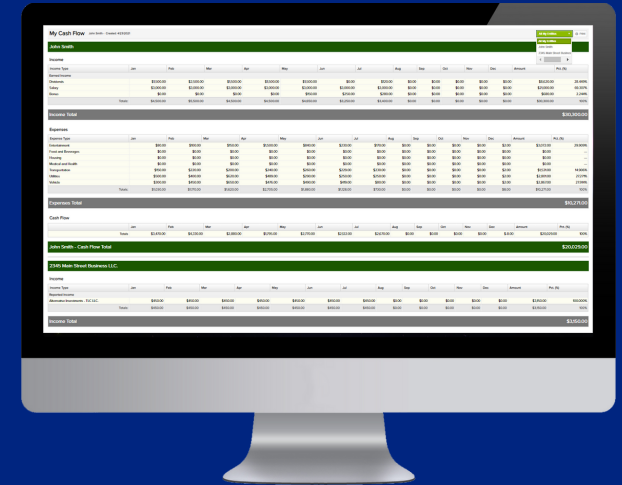
**Signature Line  
and Date**



**Income  
Statements**



**Integrated  
Disclosures**



## The CalcuTrack Advantage

### A BETTER PERSONAL FINANCIAL STATEMENT

All assets, liabilities, global cash flow, and disclosures are neatly managed and organized by legal entities.

### EASY TO CREATE AND MAINTAIN

Our on-boarding wizard and updates from financial accounts makes the task easy to start and maintain.

### INTUITIVE AND COMPREHENSIVE

Members can add and track the data necessary to achieve their goals and create the best Personal Financial Statement ever.



# Meet The Team

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Founder

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