



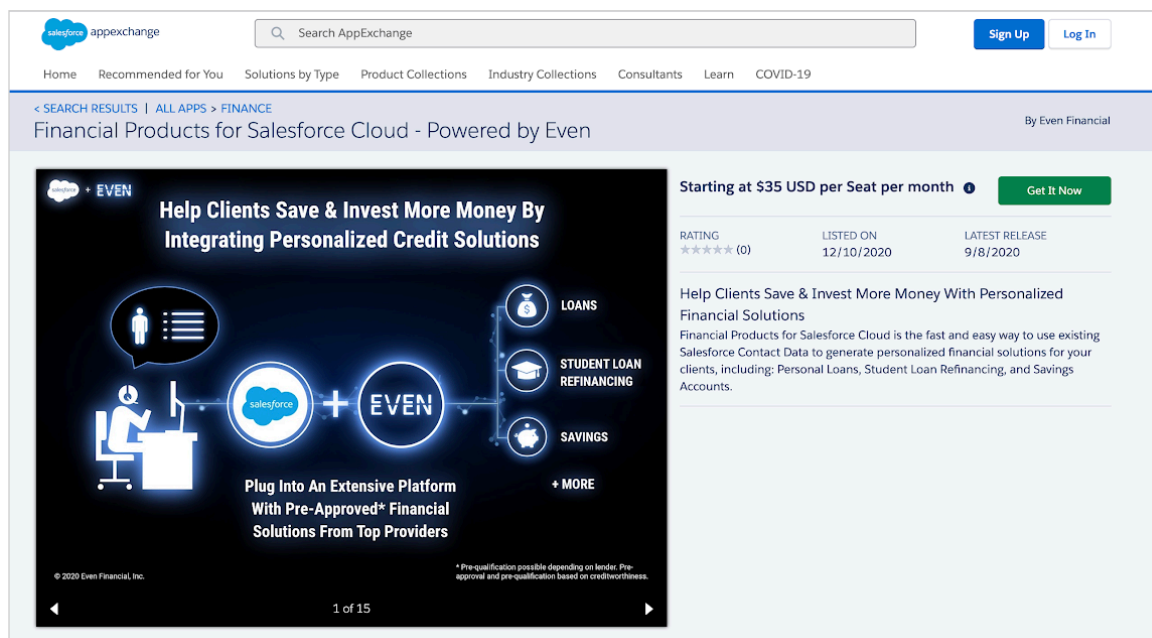
FINANCIAL PRODUCTS FOR SALESFORCE – POWERED BY EVEN

Salesforce users are able to quickly and easily generate financial solutions for their clients by installing the 'Financial Products for Salesforce - Powered By Even' application. Utilizing existing Salesforce Contact Data, Salesforce users are able to generate personal loan, student loan refinancing, and savings account solutions for their clients in less than 60 seconds.

Installation

Step 1: Contact Us

Contact Even via selecting 'Get It Now' on the Salesforce AppExchange or email us at Partner.Salesforce@EvenFinancial.com. Someone from our team will reach out if you meet the needs for our current limited release and/or if more information is required.



The screenshot shows the Salesforce AppExchange interface. At the top, there's a search bar and navigation links. The main heading is 'Financial Products for Salesforce Cloud - Powered by Even'. Below this, there's a large promotional graphic with the text 'Help Clients Save & Invest More Money By Integrating Personalized Credit Solutions'. The graphic includes icons for a person at a desk, a Salesforce logo, and an 'EVEN' logo. To the right of the graphic, there's a list of services: LOANS, STUDENT LOAN REFINANCING, and SAVINGS, with a '+ MORE' link. Below the graphic, it says 'Plug Into An Extensive Platform With Pre-Approved* Financial Solutions From Top Providers'. On the right side of the listing, there's a 'Get It Now' button, a rating of 5 stars (0 reviews), and a 'LISTED ON' date of 12/10/2020. The price is listed as 'Starting at \$35 USD per Seat per month'. A small disclaimer at the bottom of the graphic states: '* Pre-qualification possible depending on lender. Pre-approval and pre-qualification based on creditworthiness.'



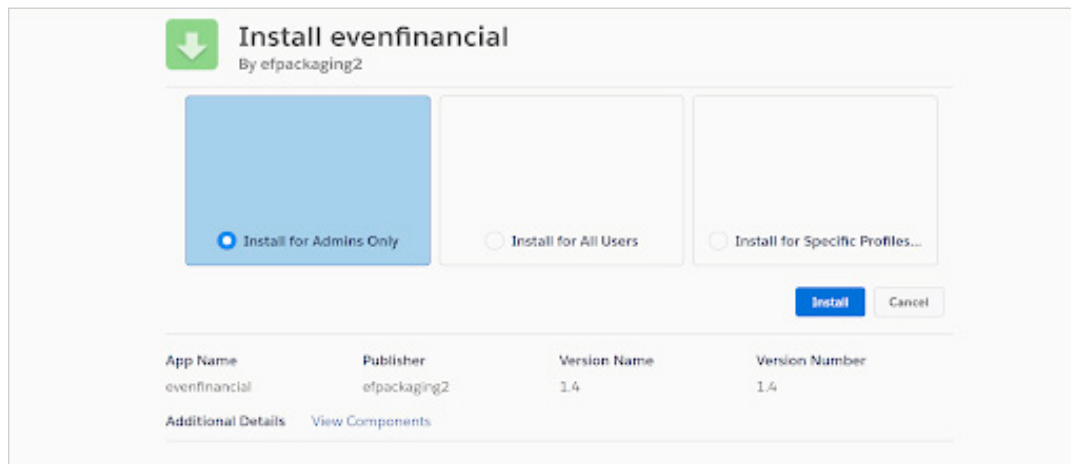
Step 2: Contact Us – Continued

If selected for our current limited release program, you'll be contacted by someone from our team to begin our compliance and contract processes. Please submit all required information and return contract in a timely manner to proceed to the installation process.

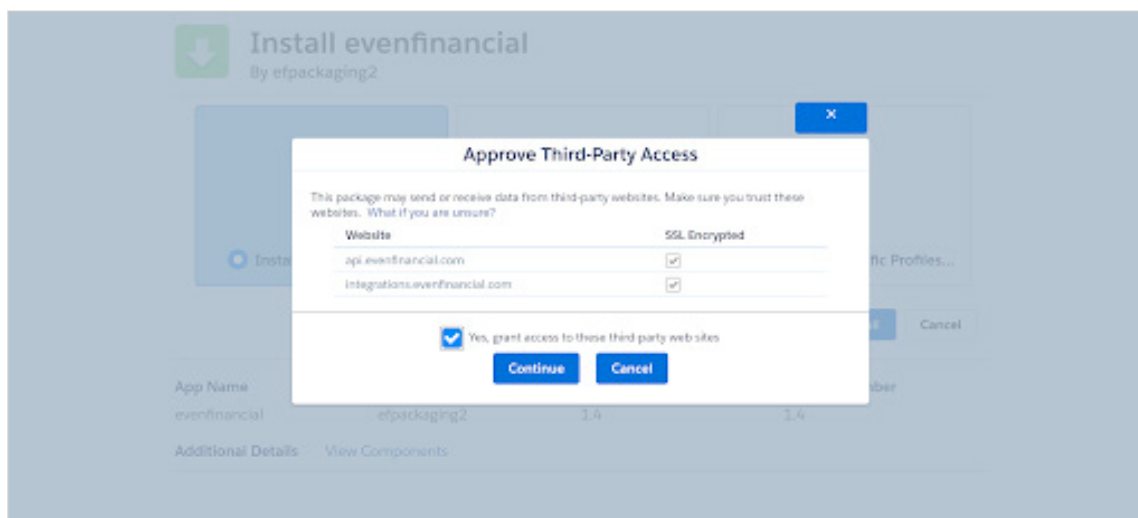
Note: Installation will not begin until all contracts have been signed and you have passed our compliance check.

Step 3: Installation

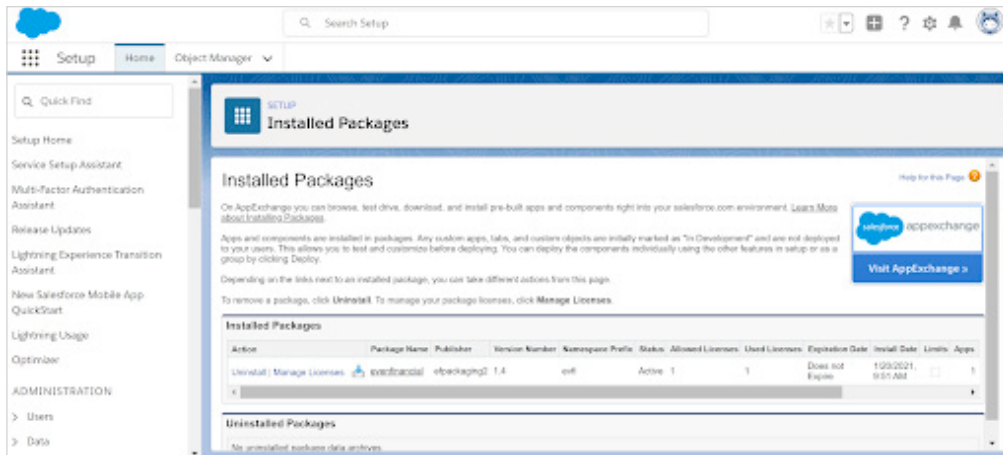
- Verify the system admin you are using has the download AppExchange permission. This can be done by going to 'Setup' in your dashboard, doing a quick find for 'Users' and clicking on Profiles. Then scroll down till you see 'Download AppExchange Packages' and make sure it has a checkmark. Note that if you are currently using a system admin profile, you should already have 'Download AppExchange Package Permissions' and therefore a checkmark may not appear.
- In a browser, go to the AppExchange website and search for the 'Even Financial' package and click on the first link that appears in the results.
- Click 'Get it Now' from the application information page. In order to install the package, you must first submit your contact information.
- Please submit all required information and return the contract in a timely manner to proceed to the installation process.
- You will receive an email from Even Financial with an Installation Link to download our package into your Salesforce instance.
- In a browser, enter the installation URL.
- Enter your username and password for the Salesforce org in which you want to install the package, and then click 'Login'.
- If the package is protected by an installation key, enter the installation key.
- On the 'Financial Products for Salesforce - Powered by Even' page, select one of the following:
 - 'Install for Admins Only' – select this option to allow only admin users in Salesforce to run guides.
 - 'Install for All Users' – select this option to allow all users in Salesforce to run guides on the objects they work with. Most organizations grant access to all users.
 - 'Install for Specific Profiles' – select this option to configure custom security settings.



- Click 'Install'.
- Click 'Yes, grant access to these third party web sites' and then 'Continue' to approve third-party access to api.evenfinancial.com and integrations.evenfinancial.com.

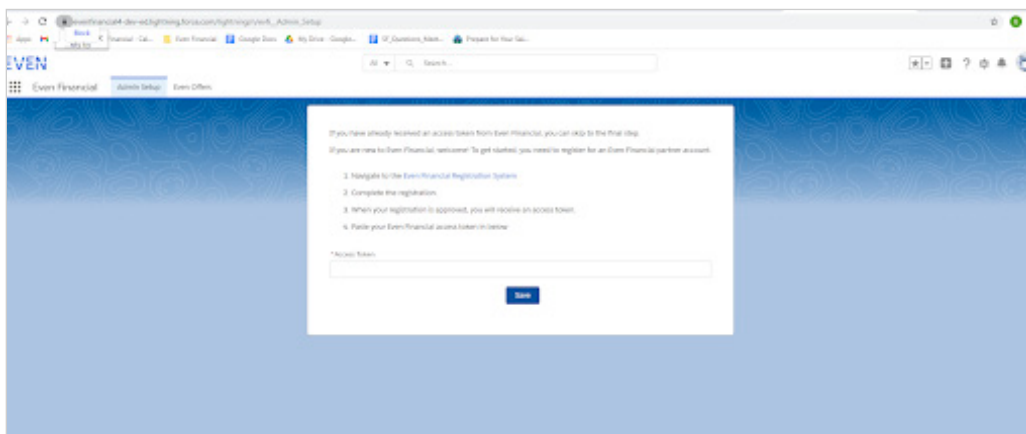


- Click 'Done' after the installation is complete.
 - If the installation takes a long time, a message will appear stating that you will receive an email when the installation is complete.
- The 'Installed Packages' page appears with the managed package under 'Installed Packages'.



- Assign the Even App User Permission Set to the additional users who need them.
 - Navigate to Setup > Permission Sets > Even App User > Manage Assignments > Add Assignments.
 - Select the check box next to the users who will be accessing and using the Even App, then select 'Assign.' Note the number of users chosen here should match the number of licenses or seats you will be using for the Even App.
- To allow the additional users to see and use the Even App, manage and assign licenses for the app via the Installed Packages.
 - Navigate to Setup > Installed Packages > Select 'Manage Licenses' next to 'evenfinancial' Package Name.
 - Add the users you have licensed for each seat of the Even App.
- Once the package has been successfully installed, navigate to the 'Even App Page' within your Salesforce environment.

**** You are only allowed to assign as many licenses as provisioned in your contractual order form with Even. If you would like to increase or decrease your license count please reach out to Partner.Salesforce@EvenFinancial.com ****



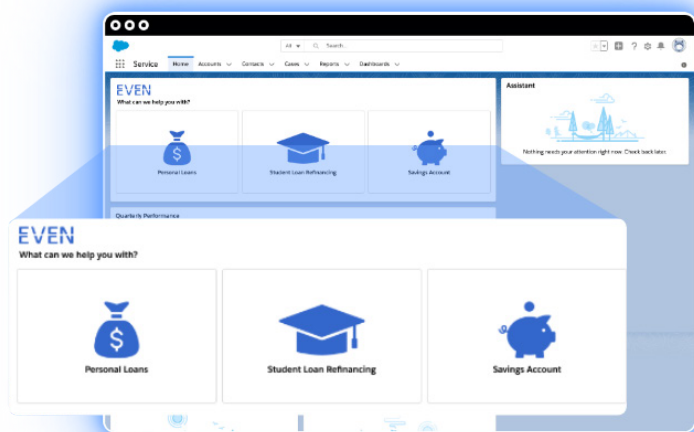
- Enter the Product Vertical Token code provided to you to access Financial Solutions!
 - If you have additional Even App Users provision the additional tokens provided to you for each user and product vertical.

How To Generate Personalized Financial Solutions

Generating personalized financial solutions for your clients takes less than 60 seconds—and has no impact on your client’s credit score.

Step 1: Choose Your Products

Click the Even Financial Products for Salesforce application within your Salesforce instance. At this screen, you’ll be asked to select the preferred financial product offering.



Financial Products Available:

- Loan Offers
- Student Loan Refinancing Offers
- Savings Account Offers
- Life Insurance Policy Quotes (Coming Soon)
- Mortgage Offers (Coming Soon)

Personal Loan Offers Include:

Loan amounts up to \$250,000
Loan terms from 24-84 months
APRs as low as 2.49% (*depending on creditworthiness*)

Student Loan Refinancing:

Loan amounts up to \$500,000
APRs as low as 2.99% (*depending on creditworthiness*)
Loan terms that can be spread out over years

Savings Account Offers Include:

APYs higher than traditional savings accounts
FDIC-insured financial institutions
Full, 24-7 digital and online access

Step 2: Contact Information

Use existing Salesforce Contact Data to fill our quick and easy form or fill out fields manually, if necessary.

Step 3: Obtain Consent

Obtain client's consent for a soft credit inquiry and confirm you have done so by checking the checkbox and clicking 'Submit'.

☒ Consent to Consumer Consent

By clicking the checkbox above, I hereby consent to the "E-Sign Agreement", the "Credit Authorization Agreement", the "Terms of Service and Privacy Policy", and am providing written consent under the FCRA for Even Financial, Inc., and its partners to obtain consumer report information from my credit profile. I agree to be contacted by Even Financial Inc. and its partners and their affiliated companies via email and/or at the telephone number(s) I have provided via this form to explore various financial products and services I inquired about, including contact through automatic dialing systems, artificial or pre-recorded voice messaging, or text message. Consent is not required as a condition to utilize Even Financial Inc., and I may choose to be contacted by an individual customer care representative(s) by calling (800) 410-1488.

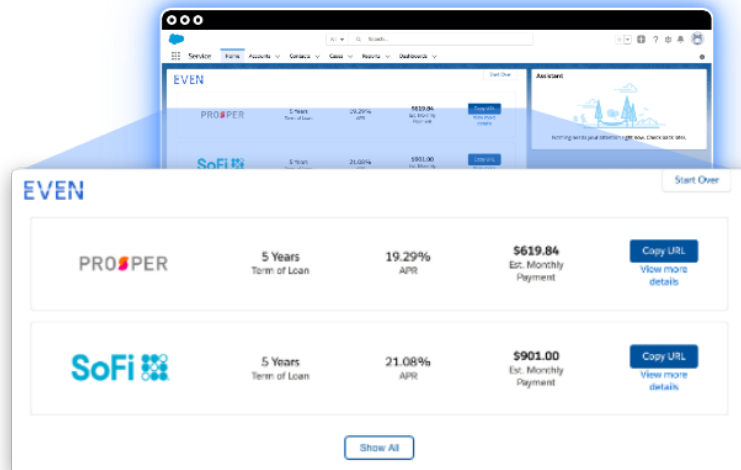
☐ Consent to FA Agreement

I hereby confirm that I have reviewed the above consents and policies with the client and that the client fully understood and that the consent was freely and voluntarily given of their own free will and accord to inquire about various financial products and services.

Back Submit

Step 4: Provide Solutions

Select the financial product offer that works best for your clients' needs. Click the 'Copy URL' button and send the copied URL to your client to finalize.



Contact Us

Have a question?

Contact us at Technical.Salesforce@EvenFinancial.com with any technical questions or concerns you may have during installation, or while utilizing Financial Products for Salesforce. We're happy to help!