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## Corporate Overview

**ProLink** specializes in Enterprise Architecture providing design, development and deployment of solutions for organizations with complex business processes that require a significant amount of data from different internal databases, spreadsheets and documents. **ProLink's** framework interfaces with other internal / external systems allowing the end user to securely share information across multiple personnel, departments and office locations providing a central collaborative work environment.

**ProLink** was first offered within the financial services industry, as a tool to automate a wide range of business process areas like processing, underwriting and managing complex transactions.

Our strategic approach is based on the fundamental principle of leveraging the client's existing financial models, spreadsheets, loan documents and data, including the intellectual capital they contain, in an automated, integrated and web-enabled process management solution. End users want to continue to use the tools that they know and trust. This approach accelerates the learning curve and enhances user adoption, which are critical to the project's success.

### ProLink Solutions Enterprise Value:

- **Asset Management**
- **Portfolio Management**
- **Accounting / Finance Management**
- **Audit Support**
- **Revenue Assurance**
- **Compliance Tracking**
- **Enterprise Performance Management**
- **Real-time Reporting**
- **Web-based Application**

**ProLink Tax Credit:** this highly complex system automates every detail to the work flow processes within Pipeline Management for New Market Tax Credit (NMTC). Our system can be used for tracking compliance on behalf of the government and the Community Development Entity. *From the onset, ProLink tracks the documentation and data* associated with deal structures, underwriting and closing equity investments within NMTC, LIHTC and HTC.

**ProLink** replaced over 30 disparate systems.

Asset Managers can leverage the Internal Business Tracker ensuring all necessary documents and financial data is in the workflow to perform analysis, research and audits, minimizing the time it takes to complete the annual review process.

### ProLink NMTC Key Features:

- Optimizing CIIS reporting information back to the CDFI
- Leveraging the Internal Business Tracker
- Tracking regulatory compliance requirements:
  - Operating statements
  - FIN 46
  - Site Visits CDE and QEI certification
  - Bank Statements
  - Leveraged Structures
  - QLICI's, Project detail
  - Integrated compliance tracking with NMTC and HTC
- Reporting – providing transparency

*With any investment, there are risks. These include the underlying credit risk on the pool of assets in which the money is invested and the loss of tax credit and penalties if the CDE fails to meet NMTC requirements.*

**ProLink Mortgage / Finance:** developed specifically for the commercial mortgage process, *helps streamline processing,* underwriting and managing complex commercial and multifamily loan transactions. **ProLink** acts as the sub ledger linking to the general ledger tracking over \$30 billion a year in new commercial real-estate transactions.

**ProLink Compliance:** developed for any industry with needs in managing the compliance process by providing an enterprise solution that supports existing tools and processes. *ProLink's compliance tracking capabilities*

*include a work flow engine that allows each client's policies and procedures to be completed by the system.*

### Important features include:

- **Asset Management** – Monthly tracking and processing of large volumes of transactions each month.
- **Portfolio Management** - Facilitate summary, trend and comparative analysis of portfolio.
- **Document Management** - Workflow and checklists to manage the various forms of data providing standard and ad hoc reporting capabilities.

**ProLink SmartDox Office Integration:** **SmartDox** technology provides full integration with Microsoft Excel® and Word® documents. **SmartDox** captures multiple sources of data from different entities and can “send” and “get” data from the point database providing “real time” information, insuring user adoption, which is paramount for our clients. **SmartDox** eliminates human error caused from dual entry or transferring data from multiple formats. **SmartDox** captures this data allowing the company to benefit from their invested intellectual capital.

### Partial List of Key Clients:

- US Bank
- First Trust
- Coldwell Banker CBRE / Melody Capital Markets
- Collateral Mortgage Capital
- John Hancock Life
- McCracken Financial Systems
- GMAC Commercial Mortgage

### State Government Contract Listing:

- Virginia Housing Dev. Authority (VHDA)
- Michigan State Housing Dev. Authority (MSHDA)
- Colorado Department of PH&E

**Type of company:** SBA - Founded in 1998 (Privately held)

**Security Clearance:** SSBI clearance – Active

**NAICS:** 541512, 518210, 541511, 519190, 511210, 541519

**CAGE Code:** 37PY4

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