

FIRM LICENSING · YEAR 1

DOS for Your Firm.

The #2 expense, run on rails.

Your clients spend more on group health than anything except payroll. Dynasty Operating System is the operating layer that runs that expense across your entire book — transparent, capped, and built so the math works before you sign.

PARTNER BRAND

[PARTNER FIRM]

Powered by Dynasty · white-label available

PRIVATE PAGE — INVITATION ONLY
DOS // DECISION INTELLIGENCE MAP
DON CANADA · FOUNDER, DYNASTY
FORT WORTH, TX · EST. 1993

THE PROBLEM

Every client you advise has a
\$500K – \$5M expense running unmanaged.

WATCHED

01

Renewal lands. Firm reads the percentage.
No one runs the numbers behind it.

OUTSOURCED

02

Broker owns the data, the carriers, the
renewal narrative — and the relationship.

UNQUANTIFIED

03

Client has no scoreboard. EBITDA impact is
invisible until the renewal hits the P&L.

THE #2 EXPENSE ON EVERY CLIENT'S P&L. YOUR FIRM CAN EITHER WATCH IT — OR RUN IT.

THE PATTERN

Five things break. Five things build confidence.

Every plan we open shows the same shape. That shape is the product.

5 BROKEN

What we always find

- 01 Renewal math no one re-derives
- 02 Stop-loss & ASL exposure unread
- 03 Pharmacy spread hidden in the rate
- 04 Plan design built for the carrier, not the owner
- 05 Compliance gaps the broker won't mention

5 CONFIDENCE

What we always restore

- 01 Owner-readable scoreboard
- 02 Captured savings, in dollars
- 03 Clean compliance posture
- 04 Plan design tied to the owner's goals
- 05 Quarterly EBITDA accountability

THE DECISION INTELLIGENCE MAP

Three documents in. The whole picture out.

INPUT 01

Renewal

Carrier renewal letter. Current premium and rates.

INPUT 02

Billing

Most recent monthly medical plan billing statement.

INPUT 03

Census

Employee census — ages, dependents, location.



OUTPUT // THE SCOREBOARD

Every cost, every leak, every recoverable dollar — in one view.

Owner reads it in five minutes. Firm reads it across the entire book. Same scoreboard, every quarter, every client.

THE SCOREBOARD

What every owner sees on Day 1.

\$500K

Annual plan spend

BASELINE TODAY

\$735K

Year 5 at 8% trend

WITHOUT INTERVENTION

\$X

Recoverable today

QUANTIFIED IN DIM

\$Y/yr

Annual EBITDA impact

QUARTERLY · LIVE

RENEWAL CORRIDOR

Locked range. No surprises at renewal.

LEAK REGISTER

Every dollar of waste named, sized, and assigned.

COMPLIANCE POSTURE

ERISA, ACA, COBRA, CAA — green, yellow, red.

BUILT FOR YOUR VERTICAL

One operating system. Four advisor profiles.

DOS slots into the work you already do — without rebuilding your firm.

v01 **Community Banks** Hold the deposit. See the cash flow. Finance the growth. DOS lets the bank become trusted operator on the #2 expense — without writing a policy.

v02 **CPA Firms** Trusted on tax, audit, advisory. The largest non-payroll line is currently outside your scope. DOS brings it inside, with audit-grade transparency.

v03 **CFO / Fractional CFO** You own the financial model. Group health is the line you're asked to optimize without the data. DOS is the data — and the corridor.

v04 **Law Firms** Plan documents, fiduciary process, ERISA exposure. DOS is the operating layer to remediate it across the client base, not one matter at a time.

TWO BRANDING TIERS

How DOS shows up in front of your clients.

WHITE-LABEL · RECOMMENDED

Your brand. Our engine.

- ▶ Your firm dominant on every owner-facing screen
- ▶ Dynasty mark removed from owner experience
- ▶ Custom subdomain · yourfirm.advisory.host
- ▶ Co-branded scoreboard PDFs and reviews
- ▶ Supports your retention story, not ours

POWERED-BY · ENTRY TIER

Your brand. Powered by Dynasty.

- ▶ Your firm primary; small Powered-by-Dynasty mark
- ▶ Faster activation — no subdomain handoff
- ▶ Same scoreboard, compliance, EBITDA model
- ▶ For firms validating DOS on a small block first
- ▶ Upgrade to white-label any time during the term

YEAR-1 LICENSING

Transparent. Capped. Published.

Pricing scales with how many clients your firm actually runs through DOS.

T-1	Up to 10 clients ≤ 12 months	\$25,000	Prove it with 10. Validate DOS on a small block.
T-2	11 – 25 clients 12 – 24 months	\$40,000	Make DOS a real edge. A true portfolio tool.
T-3	26 – 50 clients 12 – 36 months	\$50,000	Make DOS the operating system of your firm.
T-4	51+ clients Custom term	Custom	For larger books. Designed corridor protecting DOS at scale.

YEAR 2 AND BEYOND

\$50,000 / year is the natural baseline.

\$50K

ANNUAL · ALL-IN · NO ESCALATORS

Once a firm has seen the Scoreboard across its book, \$50K is the floor of what serious firms pay to keep the operating system running.

- ▶ Includes platform updates and DIM versioning
- ▶ Quarterly EBITDA reviews delivered through your firm
- ▶ Compliance command center stays live every quarter
- ▶ Renewal corridor monitoring on every active plan

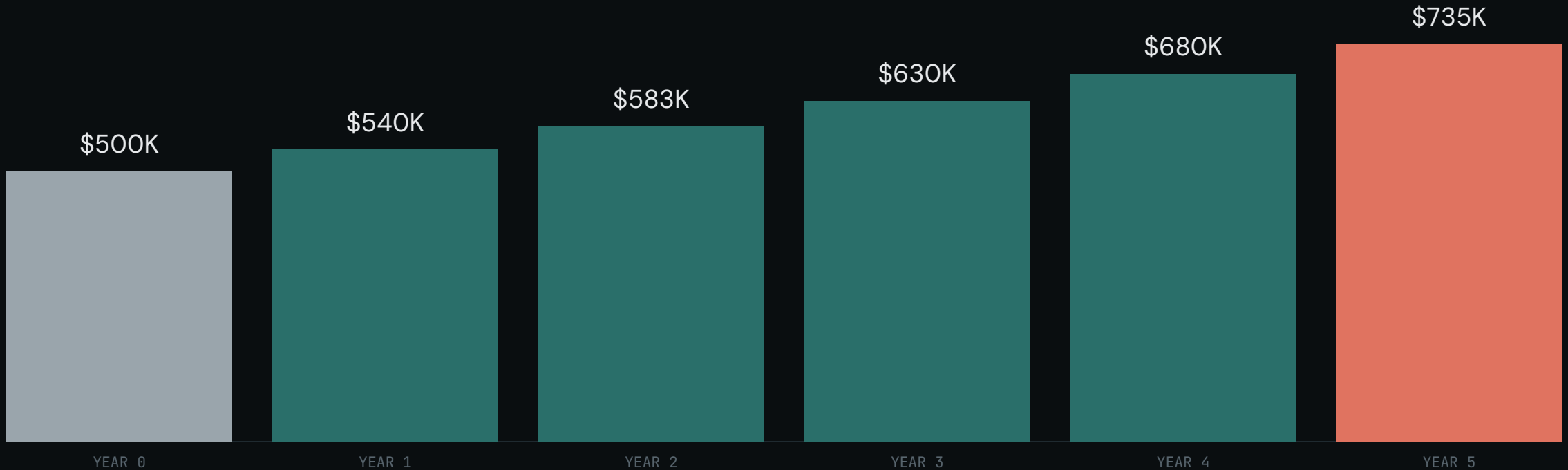
AT 8% ANNUAL TREND, A \$500K PLAN BECOMES \$735K IN FIVE YEARS – WITHOUT A SINGLE CHANGE.

THE MATH EVERY OWNER WILL ASK ABOUT

\$500K becomes \$735K in five years.

Compounded at 8% annual trend — without a single change.

+\$235K · +47% · ZERO INTERVENTION



HOW IT WORKS

Your firm. Your clients. One operating system.

01

License DOS

Pick the tier that matches your book. Fee is locked. No surprises, no escalators. DOS as a tool, not a vendor relationship.

02

Run Clients Through

Each client takes their DIM. Three documents in. Scoreboard lights up. You see what the #2 expense is costing — and where the waste lives.

03

See the Pattern

5 broken / 5 confidence emerges across the book. Waste identified, reported, recovered — with the owner always in the chair.

NEXT STEP

Take your firm's DIM.

If you're advising on the #2 expense, you should know what your own DIM looks like.

ACTION · THIS WEEK

Schedule the firm DIM session.

We bring the engine. You bring three documents from one client.
Forty-five minutes. You leave with the scoreboard.

DIRECT LINE

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FORT WORTH, TX · EST. 1993