

Dear Valued Clients and Partners,

Welcome to 512Financial. When we founded this company, our vision was clear: to provide growing businesses with the financial expertise they need to thrive, without the burden of full-time salaries, benefits and payroll taxes. Since 2014, we've been dedicated to this mission, and in 2022, we officially launched 512Financial to expand our reach and impact. Since our inception, we have expanded our services beyond financial expertise. In May 2022, we added HR services, and in May 2023, we introduced marketing services. These additions have enabled us to serve our clients more comprehensively and address their evolving needs effectively.

I started this journey because I saw a need in the market for flexible, high-quality services that could adapt to the dynamic challenges of growing businesses. Every day, I am inspired by the incredible resilience and innovation of our clients. It's this inspiration that drives us to continuously improve and expand our offerings.

At 512Financial, we believe in creating opportunities for improvement and growth. This extends not only to our clients but also to our talented team. We are proud to attract and retain exceptional talent by fostering a strong company culture, being committed and reliable, and offering great benefits such as unlimited PTO and excellent parental leave. This dedication to our team is reflected in our impressive Gallup employee engagement score of 4.64 out of 5. Our employees' well-being, engagement and satisfaction translate into unmatched value for our customers and partners.

Since our inception less than three years ago, we have more than 10x-ed our employee count, while maintaining a client Net Promoter Score (NPS) well above the service industry average across the 70+ clients we've served thus far.

Thank you for trusting us as your strategic growth partners. That trust is something that we do not take lightly and feel the responsibility of ensuring it is well earned. We look forward to supporting your journey and helping your business achieve new heights.

Warm regards,

Bart Davis

Bart Davis, CEO and Co-Founder of 512Financial