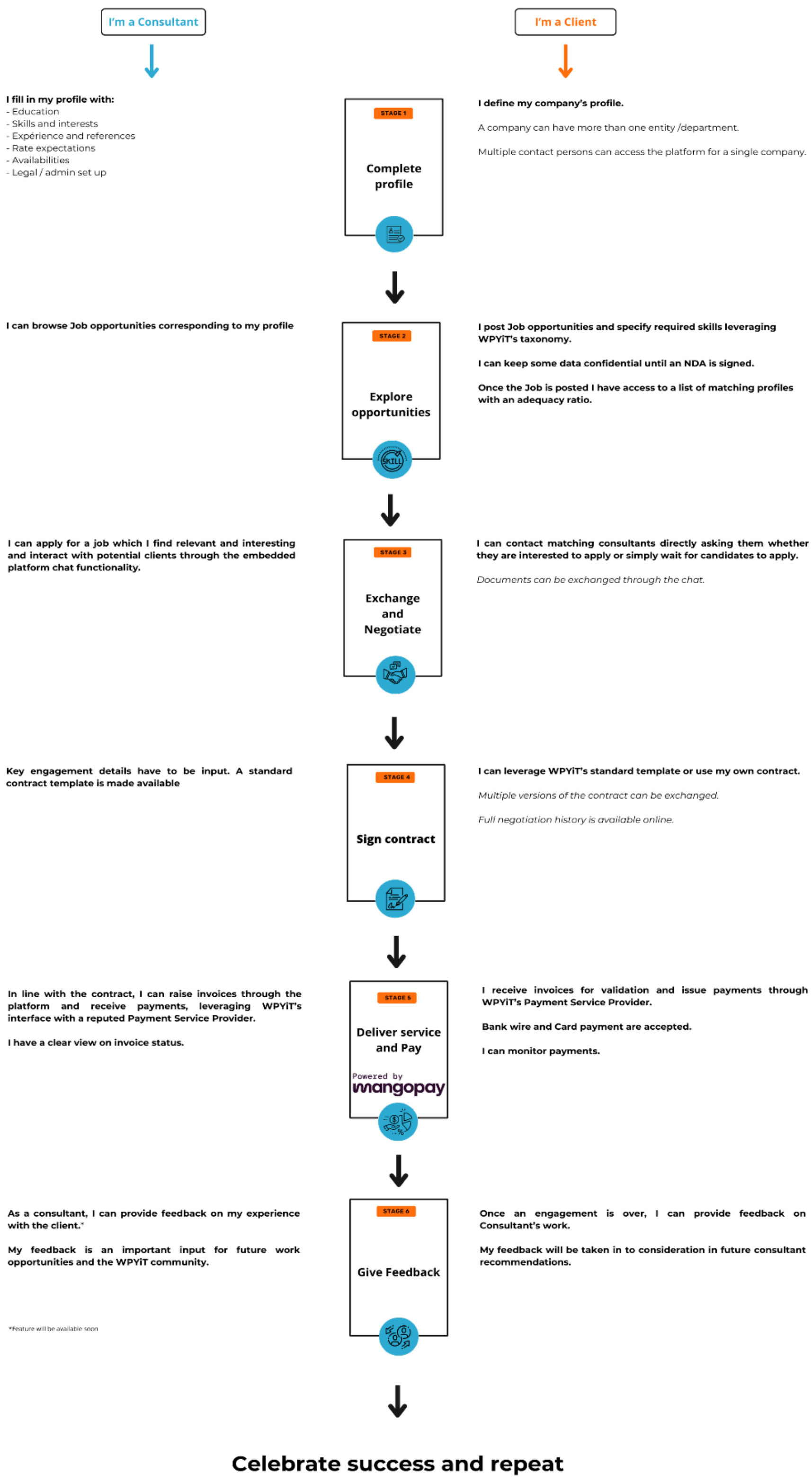
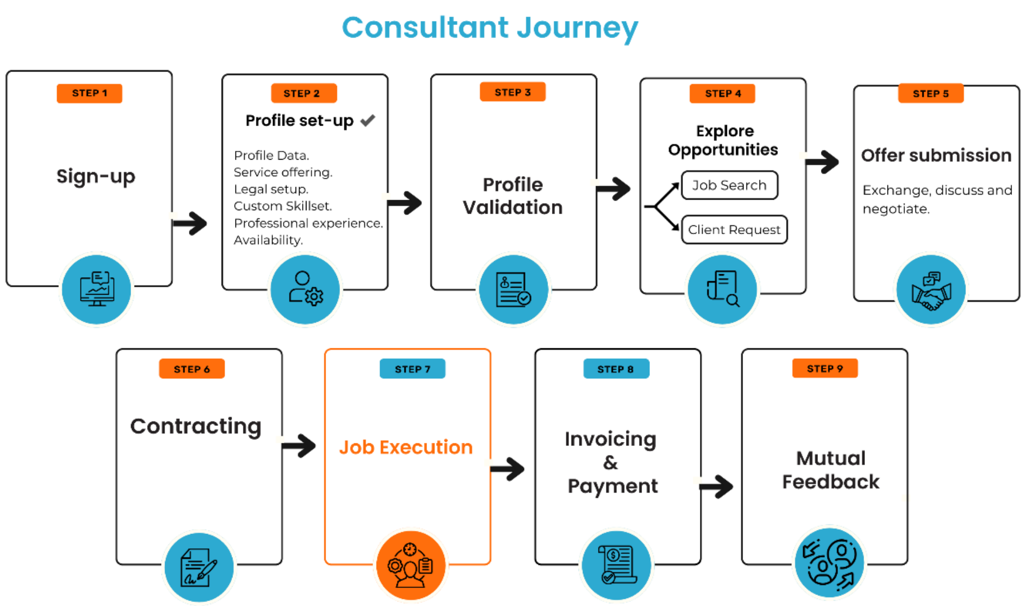
Help

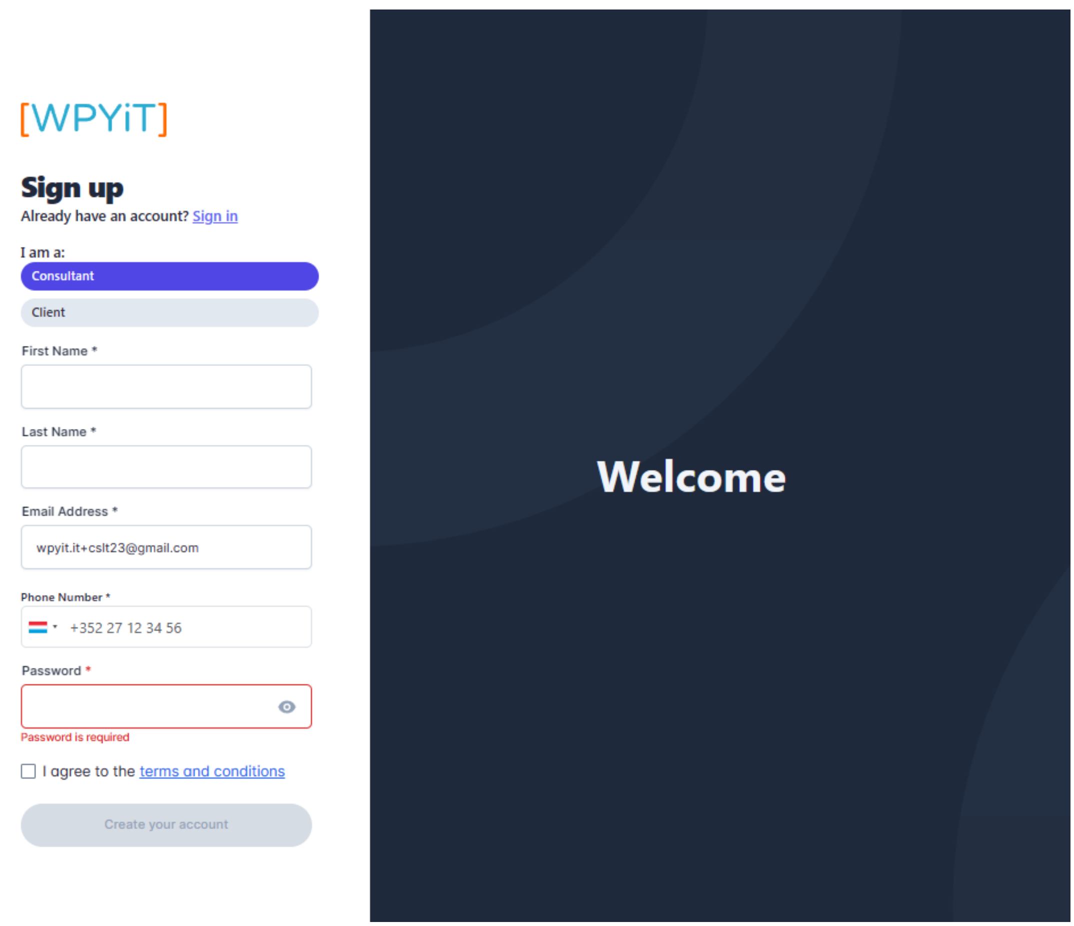
1 General Workflow (interactions)



2 Consultant



2.1 Sign up



Through the Sign-up screen you can start registration.

⚠ **Pay attention to the highlighted knob under "I am a:" It should be "Consultant".**

Fill in your details. You can access our terms and conditions. Accepting them is a prerequisite to registering.

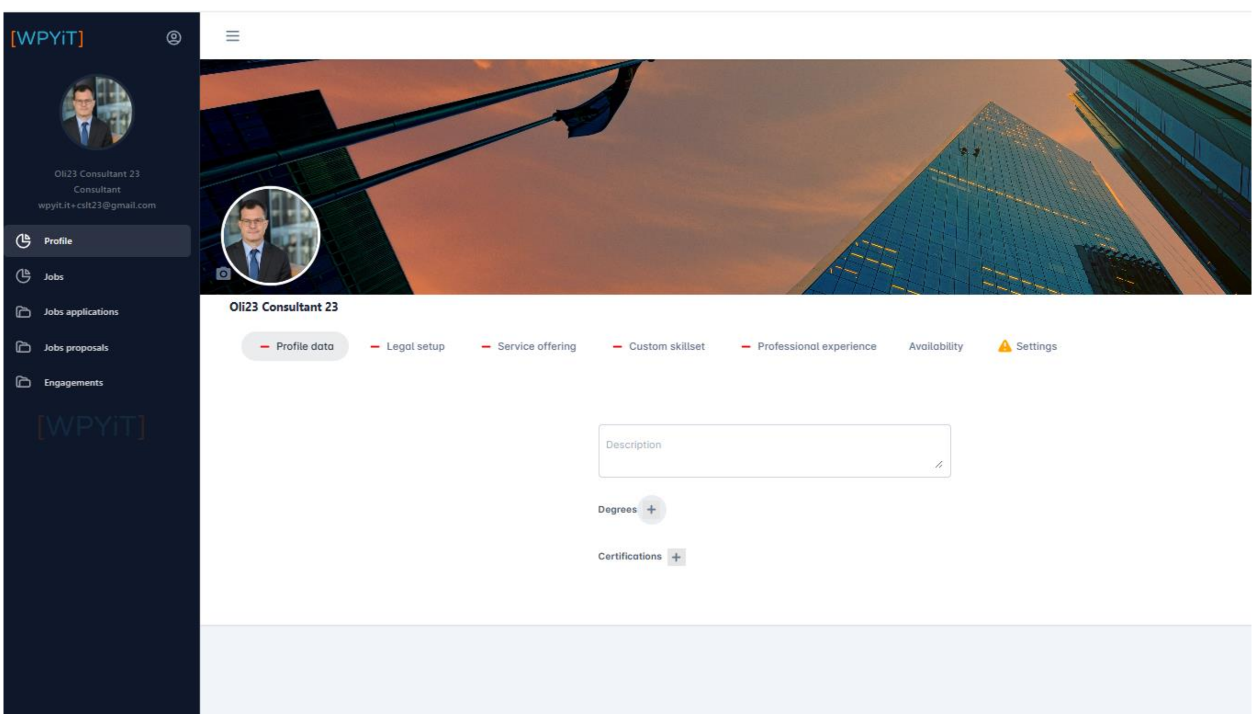
Once you have clicked on "create your account", an email is automatically sent to your inbox for confirmation. Click on the received link to validate your email address. You can now sign in and proceed to profile set up.

Always check your inbox. We will be regularly sending you messages informing you about potential jobs, application progress, invoice payment etc.

On the platform itself, you will see notifications on the screen top left corner by clicking on the small bell. If you click on a notification, you will access directly the event or the required action. You can mark as read a notification by clicking on the "." and delete with the "x".

At any time, you can contact our customer support by clicking on the blue button located at the bottom right hand-side of the screen. We will do our best to respond as fast as possible.

2.2 Profile Set up

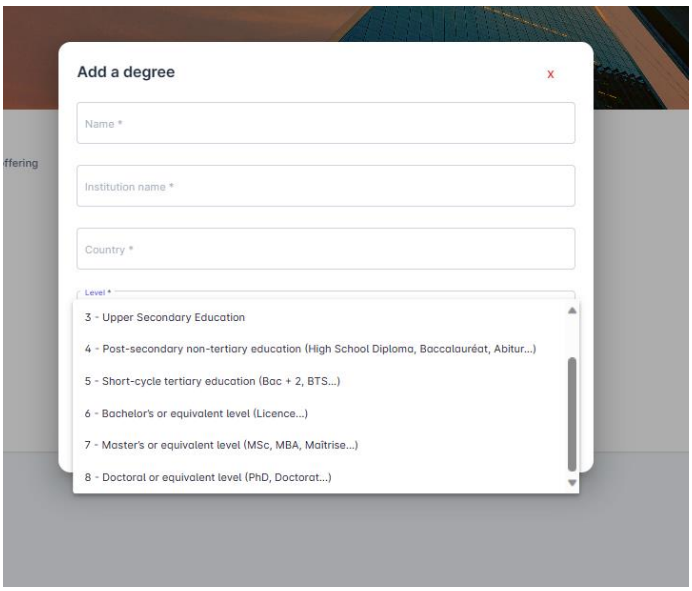


Once signed in, you land on the profile set up page. Start personalizing your page and add a recent professional picture by clicking on the camera sign next to the picture placeholder.

7 tabs are accessible at the top of the page. A red line next to Tab title means that no data has been input. Conversely, a green tick mark indicates mandatory data has been input.

Profile data tab:

- Fill in a short and enticing description of who you are in the description field. This text will appear first when Clients look for consultants.
- Add your degrees. Pay particular attention to the level mentioned for each degree. It will be later used by our search and matching engines.
- You can also add a file with a scan of your degree. It will give you a bonus in the scoring.



- Similarly, certifications can be added.

Legal setup tab:

As a consultant you can operate both as independent professional ("sole trader") or through your own legal structure ("business"). This screen allows you to enter all necessary data regarding your legal setup.

Most fields are self-explanatory.

A few comments on some fields:

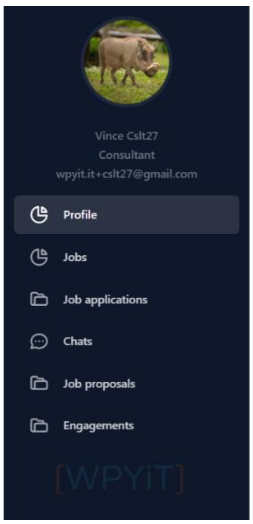
- Company registration number is the unique identifier of your company. For Luxembourg, it is your « Registre du Commerce et des Sociétés » number.
- "Authorized places of execution" is particularly important. You must mention the countries where you are legally allowed to work as an independent. It is your responsibility as a consultant to ensure you have all necessary authorizations before starting any work. WPYiT reserves the right to exclude you from the platform should you not comply with applicable legislation.

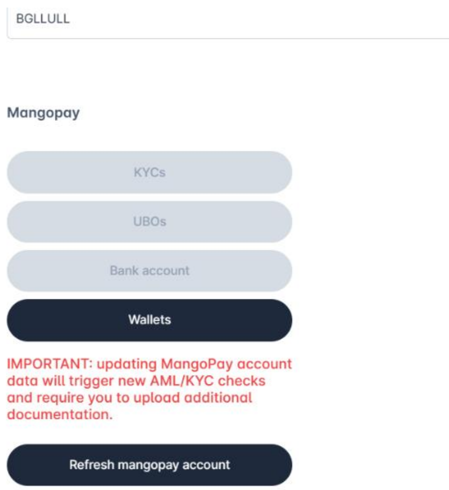
Mangopay is our Payment Service Provider. They manage payments made to you through our platform. As a regulated organization they are obliged by law to perform Anti Money Laundering / Know Your

Client due diligence on all payment recipients. You therefore need to populate a specific screen with your account number (IBAN) and additional data for them to fulfil their obligations. You also need to accept their Terms and Conditions. All of this must be done through a dedicated form accessed by clicking on the red "Mangopay Set up" knob at the bottom of the screen.

Depending on whether you operate as a sole trader or through a separate legal entity, information to be provided to Mangopay will differ. For a corporate structure, you will be asked to provide further details on Ultimate Beneficial owners.

IMPORTANT: the connection with Mangopay may take some time. Once you have completed the form accessed through the "Mangopay Set up" knob, additional buttons will appear to upload additional information: "KYCs" and "UBOs". Ensure you properly update required fields. Your profile will not be validated by platform admin as long as these data have not been provided.





You can later update your payment identification details by clicking on the "Refresh Mangopay account" button.

IMPORTANT: updating MangoPay account data will trigger new AML/KYC checks and require you to upload additional documentation.

The "Wallet" button gives you access to your virtual Mangopay account. Once the Client has paid your fees, they will be credited to your "Wallet". You will then be able to transfer the amount to your personal bank account.

Service offering tab

In this tab you will key in information on the services you deliver, where you deliver them and at which indicative price.

There are 3 service categories you can sell through the platform. Most consultants will only be active in one, but it is possible to work in more categories.

Indicate your "country location preferences". Multiple choices are possible. If you select "EU", it will include all EU countries and there is no need to tick individual member states.

"Remote work preferences" is an important parameter for job selection. It is possible to tick more than one choice.

"Time % preferences" is the preferred percentage of time you are available for work on engagements through our platform. "100" means your are potentially available full time, "50" means half time. This is indicative and will not prevent you from seeing job opportunities. Periods of availability are defined with more granularity in the "availability" tab.

"Indicative rate" is the hourly/daily rate you expect to earn for your work. For the moment, the currency of reference is EUR. As we develop, other currencies may be added. Specify your rate as well as the charging unit in the drop-down menu: by hour ("hour") or by day ("Day"). One business day is set as 8 hours.

⚠ **IMPORTANT:** the rate provided here is indicative. It will be used in the search and matching engines to identify suitable jobs for you, i.e. for which clients are ready to pay your expected rate (within a certain range). You keep the liberty to adjust and quote the rate you deem appropriate later in negotiation and contracting phases. If your rate is too high and clearly above market practices, you run the risk of not being seen by clients and miss interesting jobs.

"Confidentiality" indicates whether you want your name to be communicated to potential clients or if you want to remain anonymous.

"Visibility restrictions" allows you to mention companies you do not want to be visible to in our matching engine.

"Workplace accessibility requirements" tick the box if you have mobility issues. It will be taken into account in job selection (to ensure that Client's premises are accessible in case of on-site job).

Custom skillset tab:

This tab is where you precisely define your skills. Skills are classified in 5 categories:

- Industry skills
- Professional skills
- Tools and methodologies
- Soft skills
- Languages

For the first 4 categories the operating principles are the same:

- You can add as many skills as you wish per category.
- For each skill you need to indicate 2 parameters that will be used by our search and matching engines:
    - How proficient you are in the skill on a scale of 4: Beginner, Intermediate, Advanced, Expert.
    - Your level of interest in practicing this skill on a scale of 1 to 3 stars.

For languages, no interest level needs to be indicated.

By typing a few letters or a word in the input box, you will be presented with skill proposals in the drop-down list which you can pick.

We have developed a taxonomy of skills which tries to reflect the scope of skills applied in consulting work. It is available on our website. Please have a look at it to make sure you pick the right categories.

In case you cannot find a skill, you may create a new one by typing “enter” after having keyed in the missing skill. You need to allocate the skill to a category and click on “save”. You can then set your proficiency level and interest level for the new skill as for the others.

For professional skills, we have 6 broad sub-categories:

- Operations: all skills related to supporting back office or fund operations, accounting, risk etc.
- Transformation: strategy, project management, process optimization, organization, productivity, business analysis, change management, IT.
- Protection: all skills pertaining to risk management, compliance, oversight, control.
- Growth: business development, client relationship, marketing, M&A, new business set up.
- Specific regulations and Norms: financial services regulations (AIFMD, UCITS, MiFID, PRIIPS…), ISO norms, IFRS, to name a few
- Other expertise: actuary.

For tools and methodologies, we have the following sub-categories:

- Programming languages and framework
- Database
- IT tools and systems. In this sub-category, you will find commonly used software packages and ERPs.

For Soft Skills we have listed commonly used skills.

We advise you to be as exhaustive as possible when listing your skills. They are key to help you be noticed by Clients. Our matching engine will allocate a score to your profile based on how many required skills you possess.

Professional experience

In this tab you will indicate your professional experience.

For each experience, you need to enter:

- The company you worked for. If you do not wish to disclose company name, you can also use a neutral formulation, such as “large financial institution”….
- The skills you applied in the work experience. Only the skills mentioned in “custom skillset” can be selected. If you do not find the one you need, go back to “custom skillset” to complement your profile.
- Beginning and end dates of the experience.
- A short description of the work you delivered.
- Key achievements.

You can also mention the name and email address of a reference person. If you do so, an email will be sent to this reference person with a link to the platform, and they will be able to fill in a short feedback form. The feedback will be visible on your profile without the contact details of your reference person. Feedbacks have a positive impact on scoring.

You can also add a file with relevant documentation pertaining to the experience.

Don’t forget to enter your full relevant professional experience: our engines use it to compute your number of years of professional experience and match with jobs requirements.

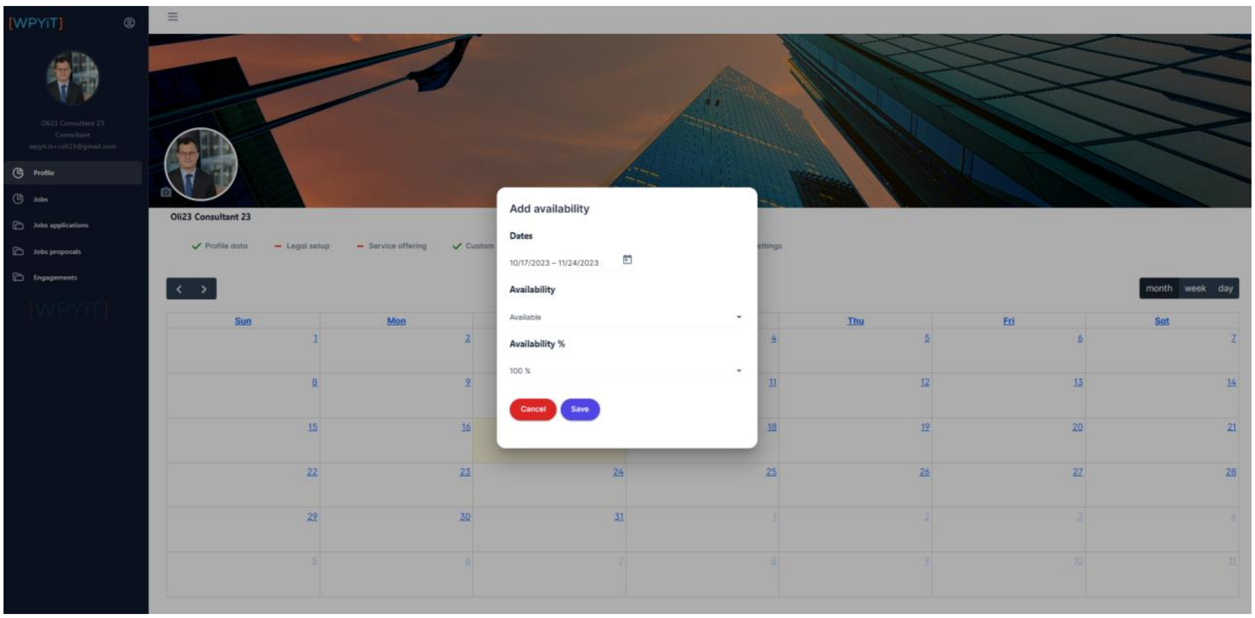
Availability

On this tab, you must specify your availability for work. This is done through a simple calendar set up feature. You can specify multiple periods with varying availability status.

Click on a day. A window opens, allowing you to indicate:

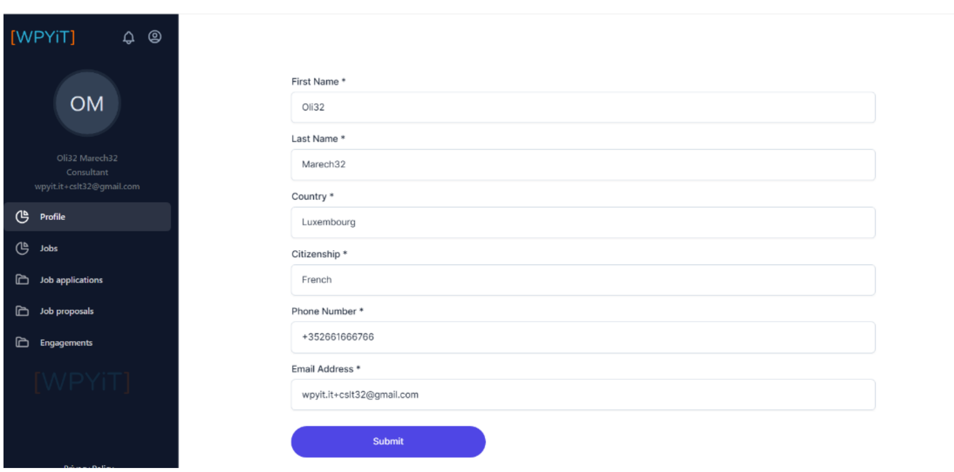
- Editable beginning and end dates for a period,
- The availability status: available, potentially available, not available.
- The tentative percentage of available time for the period.

Once populated, you can see availability status and percentage on color coded bars in the calendar. Blue means available, yellow means potentially available and a red dot means unavailable.



Settings

The settings tab allows you to update and change your contact details and password. Pay attention that all fields are mandatory. You will only be able to submit your changes if all fields are populated.



2.3 Profile Validation

Profile validation is a step that happens behind the scene and is performed by the platform administration team. We ensure that all data have been populated properly to allow our matching engine to identify the right projects for you.

We will get back to you in case of further questions.

Once your profile has been accepted, you receive an email confirming your acceptance and welcoming you to We Put You in Touch.

2.4 Explore Job opportunities

By clicking "Jobs" on the left-hand side of the welcome screen, you can already see cards with Jobs that could potentially match your profile.

You can also search the job database by typing keywords in the search box on the right-hand side of the "Jobs" screen. Searches on specific criteria can be saved and reused at a later stage.

If you click on a given job you can then see all its relevant information. Some data may be hidden if the Client has chosen to remain anonymous for example.

You can apply for a job by clicking on the "Apply" knob on the top right corner of the screen.

Alternatively, you may also be contacted directly by a Client who identified you as a potential good fit. In such a case, you will receive an alert by email and a notification will appear on the welcome screen. You can see all contact requests in the "Job proposals" section of the menu on the left.

You can then click on "accept messages" to initiate a chat with the client. You can then also directly apply for the job by clicking on the "Apply" knob in the top right corner of the screen.

You can access chat either through the "chats" option on the left hand side menu or at the job level by clicking on the "Chat" tab at the top of the screen.

2.5 Offer submission

The application details screen allows you to formally apply for a given job.

All offers have:

- a validity date,
- a client rate, which can be daily or hourly. The system will calculate the net rate you will get after deduction of WPYiT service fee.
- a textual description

You can add documents by clicking on the "Add file" knob. It can be a presentation, a formal offering or any additional documentation you deem relevant for your offer.

Required job skills are listed below and you can add comments for each one to highlight your strengths or point out a particular experience.

Once the application has been submitted, it disappears from the “Jobs” rubric on the left-hand side and is classified in “Job applications”.

The Client can now review your offer. You may use the embedded chat tool to continue the dialogue with the Client. Files can also be exchanged through Chat. All messages are stored and can be accessed by WPYiT moderators to ensure proper platform usage.

Once an agreement is reached, you can proceed to the contracting step.

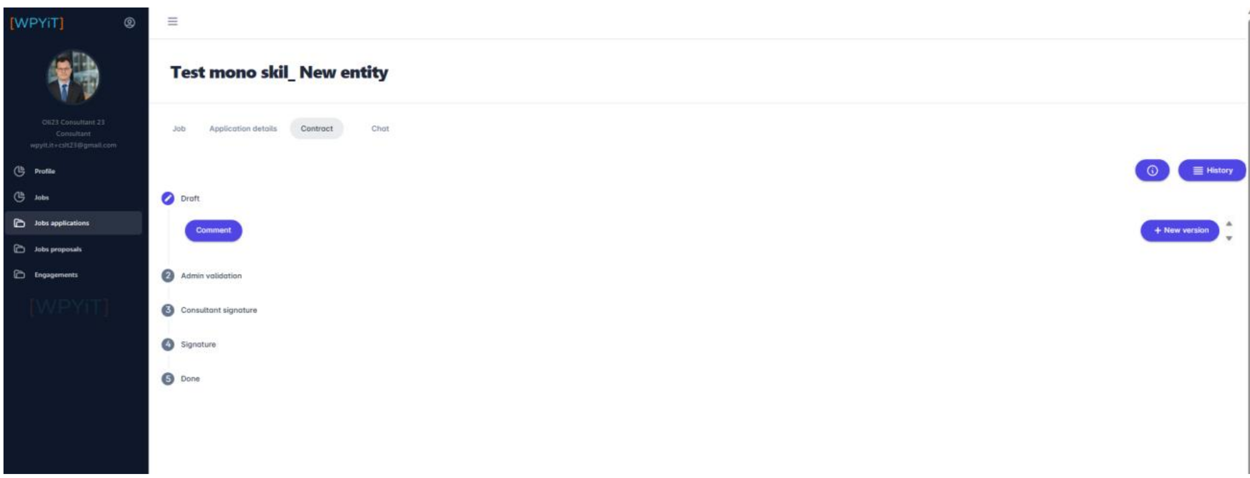
2.6 Contracting

You will be notified by email that your application has been accepted. In “Job applications”, you can also see the green label “Accepted” on the job card.

Once you have clicked on the job card, there are now 4 tabs:

- Job: it contains job details
- Application details: what you have sent in your application.
- Contract: all steps and documents related to the contracting process.
- Chat: all messages exchanged with the Client.

Through the contract tab you can draft and exchange recorded versions of the contract and comments until you reach a final version and sign it.



There are 2 ways to prepare a contract.

- Either by leveraging our standard consulting contract template or,
- By uploading an ad hoc contract.

You initiate the process by clicking on the “+ New version” knob and choose “Upload” or “Template” (to see our generic consulting engagement contract). You need to complete a form capturing the key characteristics of the engagement, ie data on both contracting parties, service delivered, payment terms and contact persons. Some fields are pre-filled based on already stored data. Do not forget to mention legal representatives in case of a legal structure by clicking on the “+” button at the end of counterparty description section.

Describe services by clicking on the “+” at the end of the service definition section. If there is more than one component to the engagement, add lines by clicking again on the “+” button. Each line will appear in the “Definition of the service” chapter.

Please make sure all input data are accurate and complete. These elements will be later used in other admin processes such as billing. You can always look at what has been input by clicking on the "I" knob on the top right-hand side.

⚠ **Review it carefully**. Even if we our contract template has been designed with all necessary care, there could be mistakes or inappropriate formulations. It is only provided as help to you and your client in the contracting process but does not constitute legal advice.

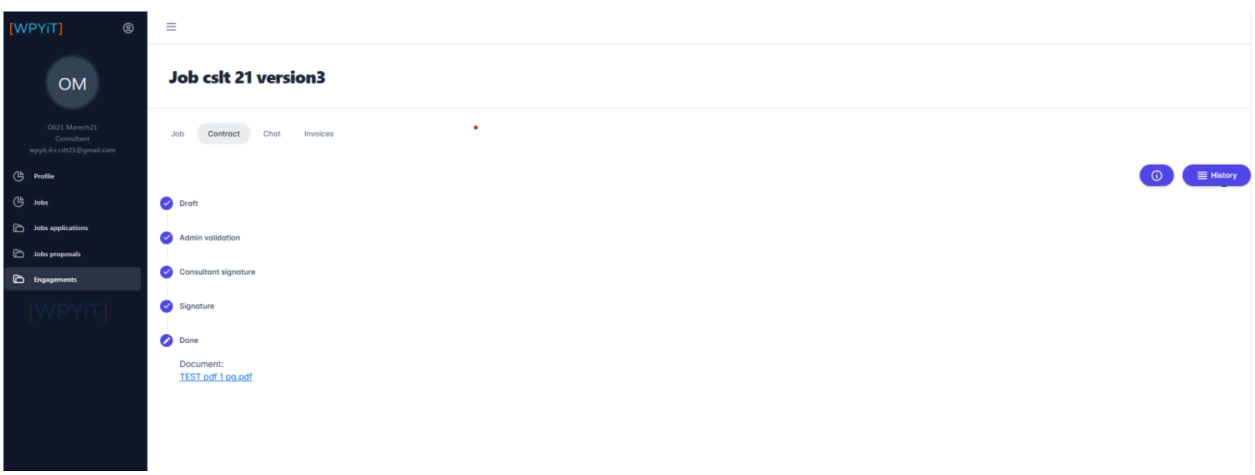
If you do not want to use our template, you can then upload your own contract including all legal clauses both parties need.

Multiple versions of the contract can be produced and exchanged through the platform. At each step you can add comments. The full history of contract negotiation is available online by clicking on the "history" knob. All exchanged contract versions can still be accessed.

Once you agree to contract terms, you need to "approve" first the contract. The Client needs, in turn, to approve it as well. Each party can then "submit" the contract for validation by WPYiT administration team. We will swiftly review the contract for compliance and moderation purpose only and validate.

Last step is for you and the Client to sign the contract. For the moment we have no electronic signature features available on the platform. You therefore need to print, sign the contract and upload it on the platform. Some Clients may require you to send a paper copy as well for execution.

Once both parties have signed, the job becomes an active engagement, which can be found in the "Engagements" rubric.



2.7 Invoicing & Payment

For all engagements, you can see 4 tabs:

- <u>Job</u>: all initial job details are presented.
- <u>Contract</u>: final signed contract and full negotiation history is available.
- <u>Chat</u>: all messages exchanged with the Client.
- <u>Invoices</u>: Tab where you can see past invoices status and create new invoices.
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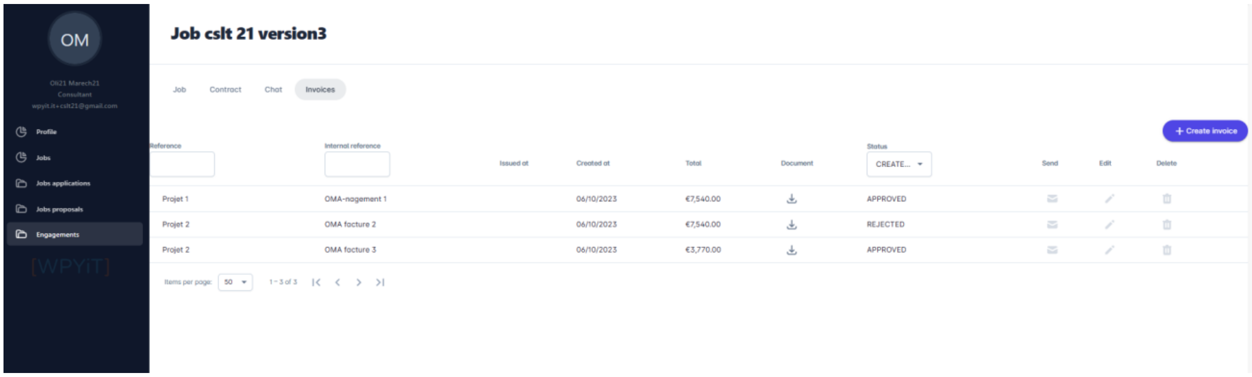
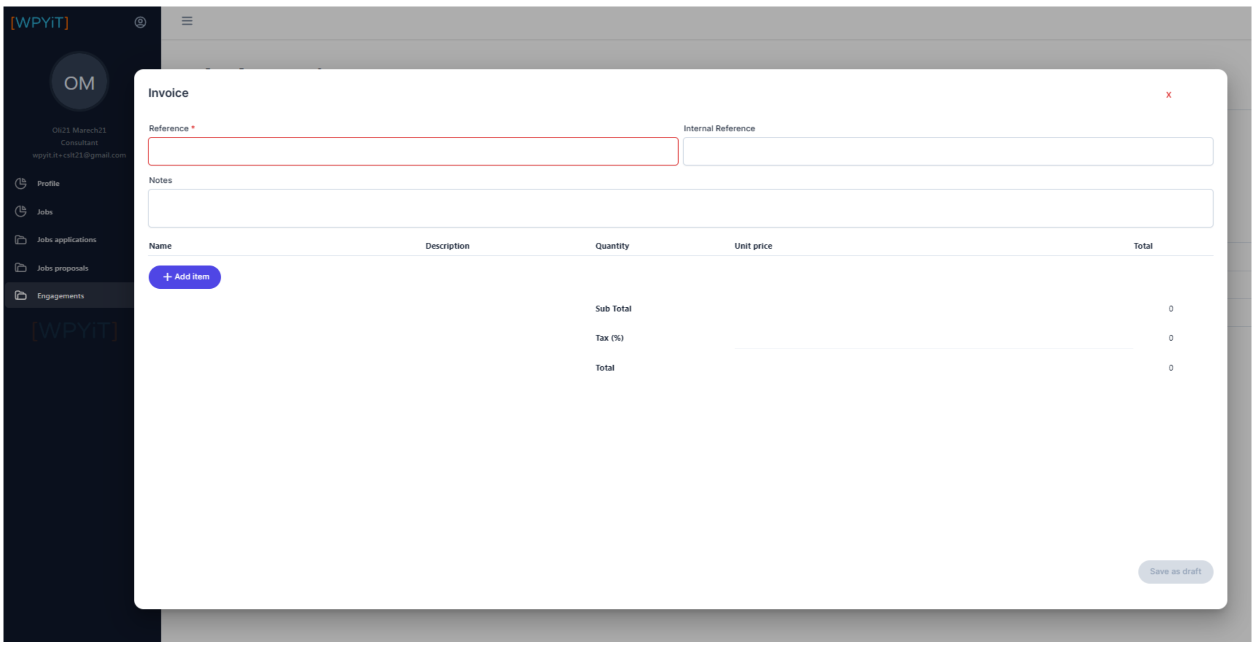


On the invoice screen, you can filter invoices by status or reference.

To generate a new invoice, click on “+ Create invoice”. A new window will open.



You need to populate the following fields:

- Internal reference: input your unique internal invoice reference.
- Notes: text that will appear at the bottom of the invoice. In case you bill without VAT, you need to specify here the legal background.

WPYiT will also automatically allocate a unique proprietary sequential number.

You then need to add lines for billing. For each line you should provide following data:

- Name: name of the consultant or item that you are billing (expenses for example).
- Description: short text detailing provided service.
- Quantity: number of days / hours to be billed, or “1” if you bill expenses or a fixed-price service.
- Unit price: Daily / hourly rate or amount of expenses/fixed-price service.

You should also provide the applicable VAT rate. Please make sure you apply the right rate. We will not systematically check the applicable VAT rate. If you charge a company based in another country, for example, you may not need to apply VAT.

⚠ **Please do not forget that you remain responsible for all tax obligations pertaining to your services.** WPYiT only supports the invoice production process and does not assume any responsibility for errors or omissions.

Once all elements required for billing have been input, you can “save as draft” the invoice. The draft invoice can be visualized by clicking on the symbol in the “document” column.

⚠ At this stage, invoice has not been submitted yet.

When you are happy with the invoice, you can send it. It will go through a quick validation process by WPYiT admin before being sent to Client inbox.

Invoice status is then changed to “Pending” until payment is effected. t.

IMPORTANT: once payment from the Client is received, a new invoice from WPYiT is raised for our service commission, in line with our GTCs and price schedule.

Your “Wallet” is then credited with the net fee amount (ie. Client fees minus WPYiT service commission) and you can transfer money out to your personal bank account, as input on the “legal setup” tab of your profile.

2.8 Mutual feedback

To be completed once functionality is in place.