



Website Proposal

Submitted To:



April 22, 2010

Introduction.

The following website proposal has been drafted by Whitefrog Design as requested by Silver Oak Wealth Advisors, LLC. This document outlines the project scope, technologies, timeline, fees and resources required. Specific references to technology and timelines are provided based upon the information currently available and are subject to modification.

This proposal shall be void if it has not been executed and returned to Whitefrog Design by May 20th of 2010.

I thank you for the opportunity to submit this proposal and look forward to answering any questions you may have.

A handwritten signature in blue ink, appearing to read "mleeds", written in a cursive style.

Matthew Leeds, Owner
matt@whitefrog.org
(951) 545-1883 cell

Whitefrog Design, LLC
19 E. Citrus Ave., Suite 201
Redlands, California 92373

Project Description.

Silver Oak Wealth Advisors, LLC desires to have their firm's website rebuilt so that it meets both strategic and aesthetic marketing goals.

The main elements of the website have been identified as the following:

- **Design** – The current website uses dated graphics and poor use of content for directing visitor traffic. An updated design will use a modern layout for the pages, navigation and content as well as usage of colors that are aligned with SOWA's brand.
- **CMS** – A Content Management System (CMS) allows the content of the entire website to be edited directly through an online control panel. The benefit of a CMS is that changes / updates to content can be applied directly to the website without the need of coordinating with web programmers.
- **Video** – When properly executed, the power of videos to communicate a message is unparalleled on websites. To achieve this goal, videos will be placed on the Home, Media, Attorneys and Women in Transition page of the website and will be posted in large format to vividly engage the viewer.
- **Message** - The marketing messages of the current website are dated and do not reflect the current brand. By updating the content to have greater relevancy to Silver Oak Wealth Advisors, LLC and its brand, SOWA's target audience will have a compelling reason to learn more about the firm.
- **Client Access** – Provide a link to the Charles Schwab & Co., Inc. ("Schwab") account center. This link will be integrated into the website design, but there will be no modification to the client center as it is a closed-system; when clicked, users will be taken to "Schwab" website and prompted to log-in.

The following mock-up has been generated to illustrate the caliber and scope of the website.

Silver Oak
Wealth Advisors, LLC

Mastering the complexity of wealth

Phone: (310) 207-4800

Home
About
Media
Contact

Mastering the complexity of wealth

Welcome to Silver Oak

Lorem ipsum dolor

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam commodo tristique nulla, sed luctus diam tristique et. Cras libero nulla, ullamcorper hendrerit porttitor et, rutrum eu enim. Morbi vel volutpat massa. Sed lacinia risus a arcu ultrices eget accumsan nisi suscipit. Quisque et lorem vitae ipsum dapibus congue molestie ac nisi. Etiam lobortis nisi vitae elit pharetra porttitor. Fusce molestie nunc et turpis sollicitudin semper. Nulla laoreet, metus eget laoreet cursus, urna enim rutrum eros, non tincidunt odio lacus vel nunc. Aliquam eu hendrerit erat. Praesent cursus molestie auctor.

Learn More
Attorneys
Women in Transition

Silver Oak Media

SilverThreads ~ Topics to Share
Congress Passes New Legislation on Cadillac Tax Plans - Jan 01, 2010

SilverLining ~ Market Commentary
Why the rush for gold investments may not be such a winning idea - Jan 01, 2010

Silver Oak in the Press
Joel Framson appears on MSNBC to talk about investments - Dec. 31, 2009

Photos to Share
Joel Framson's vacation to Thailand in February 2006

Silver Oak Media

- SilverThreads ~ Topics to Share
- SilverLining ~ Commentary
- Silver Oak in the Press
- Photos to Share

Client Center

- Account Center Login
- Interview Form - Quality of Life
- Financial Planning Questionnaire
- Education & Links

Compliance & Regulatory

- ADV Form II
- Privacy Policy
- FDIC Article
- FDIC Brochure
- SIPC

Contact Information

Silver Oak Wealth Advisors, LLC
12121 Wilshire Blvd., Suite 1300
Los Angeles, California 90025

Tel. (310) 207-4800
Fax. (310) 943-0398

©2010 Silver Oak Wealth Advisors, LLC. All rights reserved.

Website Outline.

The following content outline has been drafted for the SilverOakWA.com website based upon previous discussion and review of the existing website:

- **Home**
 - Introduction to Silver Oak Wealth Advisors, LLC
 - Silver Oak media
 - Appropriate photograph placement
 - SOWA video introduction
 - Section with links directing visitors to:
 - **Attorneys page**
 - Video introduction to services provided especially for attorneys
 - Paragraph containing further information on services provided for attorneys
 - **Women in Transition page**
 - Video introduction to services provided especially for women in transition
 - Paragraph containing further information on services provided for attorneys

- **About**
 - Silver Oak message
 - Navigation sidebar on the left containing links to staff members
 - Staff biographies

- **Media**
 - Current video clips pertaining to SOWA
 - Navigation sidebar on the left containing links for:
 - Silver Threads – Topics to Share
 - Silver Lining – Commentary
 - Silver Oak in the Press
 - Photos to Share

- **Contact**
 - Phone numbers, address, map
 - Contact form
 - Photograph of exterior / interior Silver Oak Wealth Advisors, LLC offices

- **Additional pages may be added at no extra cost so long as Silver Oak Wealth Advisors, LLC provides copywriting for additional pages.**

Technologies.

The following list outlines the technologies to be used by the SilverOakWA.com website. When applicable, the fees for specific technologies have been listed for estimated purposes only. Fees are charged by third parties and are to be paid by Silver Oak Wealth Advisors, LLC and are not reflected in the fees of this proposal.

WordPress (included with package)

WordPress is an open source (free) software platform that manages website content. Known mostly for providing Blog support, WordPress can also be upgraded (without cost) to provide support for picture galleries, slideshows, calendars and other features. For the scope of the SilverOakWA.com website, WordPress will serve as a content management system.

<http://www.wordpress.org/>

Google Analytics (included with package)

Monitoring website traffic is essential to determining which pages and items are attracting individuals. By using a free service from Google, Silver Oak Wealth Advisors, LLC can track marketing campaigns, user traffic and viewing statistics.

<http://www.google.com/analytics/>

Hosting for Website + Email (currently provided by Silver Oak Wealth Advisors, LLC)

Whitefrog Design will work with the current hosting company Silver Oak Wealth Advisors, LLC uses for their website and email as this will provide the least amount of disruption and change. If the current host does not provide support for WordPress, Whitefrog Design will work to setup website hosting with a third-party. Silver Oak Wealth Advisors, LLC will be responsible for hosting fees, approximately \$200 per year. Whitefrog Design recommends Media Temple for hosting services.

<http://www.mediatemple.net/>

Project Structure & Timeline.

PHASE I – Content Assembly & Development

Estimated Start Date: April 26, 2010

Estimated End Date: April 30, 2010

Whitefrog Design will coordinate to review content provided by Silver Oak Wealth Advisors, LLC and assemble a first draft of the website.

PHASE II – Initial Construction

Estimated Start Date: May 3, 2010

Estimated End Date: May 14, 2010

The framework of the website will be constructed to match the mock up established in the previous phase. Pages for content include Home, About, Media, Attorneys, Women in Transition and Contact Us.

PHASE III – Final Materials

Estimated Start Date: May 17, 2010

Estimated End Date: May 21, 2010

Whitefrog Design will work with Silver Oak Wealth Advisors, LLC to finalize any outstanding materials necessary for the website completion. The website will go 'live' at the completion of this phase.

PHASE IV – Training

Estimated Start Date: May 24, 2010

Estimated End Date: May 28, 2010

Whitefrog Design will provide up to 2, 1-hour training sessions via GoToMeeting. Features of the website, including the editing of text and updating images, will be thoroughly explained. A website manual will also be provided and additional tutorial videos are available upon request at no additional charge.

Project Structure & Timeline (cont.)

PHASE V – Maintenance (OPTIONAL)

Estimated Start Date: May 31, 2010

Estimated End Date: Ongoing

As part of an optional monthly package, Whitefrog Design will provide Silver Oak Wealth Advisors, LLC with support of the SilverOakWA.com website. This support may be used for providing additional training, website updates, content management, website maintenance or installing any extra features.

- Option 1: 4 hours per month, \$450.00 billed monthly
- Option 2: 10 hours per month, \$800.00, billed monthly

Fees & Payment.

The following fees do not include additional costs associated with the project outlined in the technology section.

Whitefrog Design, LLC Fees

Whitefrog Design charges a flat rate for all development services.

Phase I:	Content Assembly & Development	\$850.00
Phase II:	Initial Construction	\$2,450.00
Phase III:	Final Materials	\$1,250.00
Phase IV:	Training	\$350.00
	Sub-Total	\$4,900.00
Repeat Client Discount (20%):		(\$980.00)
Project Total:		\$3,920.00
OPTIONAL – Phase V:		\$450.00 / \$800.00 per month

Payment of Fees

50% of project fees are due upon project acceptance (**\$1,960.00**).
The balance of project fees is due upon project completion (Phase IV).

Late Payment of fees

Delinquent invoices will be assessed a \$20 charge if payment is not received within 20 calendar days of the due date. Whitefrog Design reserves the right to withhold delivery or hold website services if payments are not made.

Additional Agreements.

Assignment of Project

Whitefrog Design reserves the right to assign subcontractors to this project to insure the right fit for the job as well as on-time completion. Services such as copywriting and programming are routinely assigned to subcontractors with relevant experience to the current project.

Copyrights and Trademarks

Silver Oak Wealth Advisors, LLC unconditionally guarantees to Whitefrog Design that any elements of text, graphics, photos, designs, trademarks, or other artwork furnished to Whitefrog Design for inclusion in the materials is owned by the client, or that the client has permission from the rightful owner to use each of these elements.

Ownership Rights

Until full payment is received, Whitefrog Design retains full ownership of all materials developed under this project proposal. Upon full payment, Silver Oak Wealth Advisors, LLC assumes all ownership rights of all materials developed. Whitefrog Design retains the right to use the materials developed as a sample of work for promotional, competitive and portfolio purposes.

Non-Disclosure

Whitefrog Design guarantees to Silver Oak Wealth Advisors, LLC that information shared during the development of this project will be used solely for the benefit of Silver Oak Wealth Advisors, LLC and will not be distributed, discussed or otherwise shared with any other parties unless Whitefrog Design is required to do so by court order.

Additional Expenses

Should Silver Oak Wealth Advisors, LLC require Whitefrog Design to travel as a function of this engagement, reasonable business accommodations will be reimbursed.



Proposal Acceptance.

To initiate this website development proposal with Whitefrog Design, please review the fee schedule below, sign and then return a copy of this page to the address below.

Whitefrog Design charges a flat rate for all development services.

Phase I:	Content Assembly & Development	\$850.00
Phase II:	Initial Construction	\$2,450.00
Phase III:	Final Materials	\$1,250.00
Phase IV:	Training	\$350.00
	Sub-Total	\$4,900.00
Repeat Client Discount (20%):		(\$980.00)
Project Total:		\$3,920.00
OPTIONAL – Phase V:		\$450.00 / \$800.00 per month

Payment of Fees: 50% of project fees are due upon project acceptance (\$1,960.00).
Balance of project fees is due upon project completion (Phase IV).

By signing below, Silver Oak Wealth Advisors, LLC agrees to the terms of this proposal.

On behalf of Silver Oak Wealth Advisors, LLC (authorized signature):

Authorized Signature Print Name Date

To accept, please return this signed page by fax or mail:

Whitefrog Design, LLC Fax: (909) 728-4570
P.O. Box 8844
Redlands, CA 92373

Checks made payable to Whitefrog Design, LLC (IRS EIN # 80-0519543)
To pay via credit card, please call (951) 545-1883.

Portfolio.

Please visit the following websites completed by Whitefrog Design:

<http://www.whitefrog.org/about/portfolio/>

IPS AdvisorPro®	http://www.ipsadvisorpro.com/
Keeney Financial Advisors	http://www.keeneyfinancial.com/
White River Comedy Club	http://www.whiterivercomedyclub.com/
EsBee Studios Photography	http://www.esbeestudios.com/
Tanglewood Wealth Management	http://www.tanglewoodwealth.com/
Association of Virtual Worlds	http://www.associationofvirtualworlds.com/
Africa Harvest of Hope	http://africaharvestofhope.org/
One Green Mom	http://www.onegreenmom.com/
Sales Training Series	http://www.salestrainingseries.com/

Thank You.