



## CLIENT AGREEMENT AND CONFIDENTIALITY

Thank you for considering **Genesis Preferred Solutions** to prepare your M/WBE, DBE, HUB, VBE, SDVBE, or SBE Certifications. As business consultants and Certification Experts for more than 21 years, we pride ourselves on the success of our clients. Creating a clear and distinctive path necessary to move your business towards a successful solution.

Our Certification services are by far the best in the nation! Yes, we can say this with confidence. We are experts in understanding the many variables necessary in becoming a Certified Minority, Woman, or Veteran-owned business. These Agencies are very specific about the information and Regulations that are required for this program.

Whether you are seeking to position yourself with contracts from a GIANT CLIENT such as the government, school district, or college, or from a Fortune 500 company such as Toyota, Walmart, Bell Helicopter, and many others, these organizations are mandated to provide business opportunities by way of a long-term and lucrative contracts. Your Certifications will put you in the room with decision-makers who are looking at doing business with you.

YOU'RE IN GOOD HANDS. We pride ourselves on being very thorough and meticulous when it comes to getting your business approved for your Certifications by the Agencies. We are aware of their criteria and want to make sure that your documents and applications are acceptable, without any doubt. We will also act as your spokesperson or liaison should communication or additional information is required.

This Agreement is between the following:

Your Name: \_\_\_\_\_

Business: \_\_\_\_\_

Email: \_\_\_\_\_ State Business Formed; \_\_\_\_\_

Business Description: \_\_\_\_\_

Number of Owners \_\_\_\_\_

Certifications you're applying for (check all if applicable):

**MBE-Minority Business Enterprise**

**SBE-Small Business Enterprise**

**SDVBE-Service Disabled Veteran Business Enterprise**

**Historically Underutilized Business (Texas & No. Carolina only)**

**WBE-Woman-Business Enterprise**

**Disadvantaged Business Enterprise**

**Veteran Business Enterprise**

**Airport Concessions**

# Genesis Preferred Solutions

M/WBE Certification Experts, Consultants & Mentors



## PROCESS

### STEP 1

- Submit all of the documents relevant to your business from the Checklist provided. This information helps us to prepare the necessary applications for your Certifications based on your business structure.
- Review and sign Client Agreement and Power of Attorney forms. These forms provide information on how we keep your personal information private and allow us to speak on your behalf to the Certifying agencies should they request or require additional or repetitive information.
- Please submit your MANDATORY documents from the Checklist in a PDF or WORD document via our project management portal whereby we will forward you a personal/private link. Or, via email, fax, or US mail. No pictures, JPG, or PNG files are allowed.

Genesis Preferred Solutions  
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- Also, submit your documents within the 90-day period. Any additional documents or consultation may require additional fees.
- Note: All corporation documents such as Articles, Bylaws, Operating Agreements, Minutes, Member or Stock Certificates, and Stock Ledger are mandatory documents for corporations or LLC's filed with the Secretary of State. Your state may not require certain corporation documents; however, they are MANDATORY for the Certifying Agency. **If you are unable to locate these particular documents, we can recreate them for an additional fee.**

### Step 2

- We will monitor your file every 30 days for 90 days to ensure that we have received all of the mandatory or required documents. Each time we review your file, we will send you a Revised Checklist to keep track of what has been received and which documents we are still in need of.
- If we have not received your documents within the 60 period, we will schedule a discovery call with you to determine the reason for the delay or to review your business and documents together more thoroughly for a smooth transition.

### STEP 3

- Once we receive ALL of the information, we will prepare your Applications based on the information you provide.
- Please review and sign your Applications in front of a Notary Public and return them at your earliest convenience.

### STEP 4

- It is MANDATORY to forward all emails or requests from Certifying agencies to our attention. Failure to do so will result in the cancellation of this and any agreement for our assistance.
- Your HUB Certification (Texas or North Carolina only) usually takes about 30-90 days to process once the Notarized application and documents have been submitted into their online portals. The timeline could be longer for Agencies who require a mail-in package of information. You'll receive either a call, email, or letter from the State's agency. Should this occur, please **\*notify us immediately\***. Their responses are time-sensitive. We will respond on your behalf. Should you respond without allowing us to do so, will void our Client Agreement.
- Your M/WBE/DBE/SBE Certification usually takes about 30-90 days to process with the agency once the Notarized application and documents have been submitted into their online portals. The timeline could be longer for Agencies who require a mail-in package of information. You'll receive either a call, email, or letter from the State's agency. Should this occur, please **\*notify us immediately\***. Their responses are time-sensitive. We will respond on your behalf. Should you respond without allowing us to do so, you void our Client Agreement.

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## STEP 5

- On some occasions, a SITE-VISIT may occur. Should the Agency request this, please provide dates and times of availability for this to take place. The Agency will either perform a physical Site Visit to where you operate your business or this can be done via a virtual video conference. They will ask you questions about your business and operations.
- A SITE-VISIT report will need to be initialed and signed. Please forward this form to us to complete and submit on your behalf.

## STEP 6

- Hooray! Your Certifications have been approved! We will enter the Agency's portal, retrieve your Certifications and forward them to you.
- Should the Agency determine to withdraw or deny your certification, dependent upon the circumstances, we will advocate on your behalf or file an Appeal.

## **Terms and Conditions**

The following terms and conditions shall prevail over our relationship if consented to go ahead with this proposal.

- **Payments:** Unless agreed otherwise with Genesis Preferred Solutions, all services require an advance payment of a non-refundable of \$\_\_\_\_\_ which is the total cost for services prior to the completion of commencement or completion of work. All fees and surcharges are the responsibility of the Client. Should payment arrangements be agreed upon: 4 equal payments of \$\_\_\_\_\_ are required prior to the completion of any service rendered by Genesis Preferred Solutions. Should there be a delay in payment, you agree to pay an additional **\$55.00 for late fee.**
- **Chargebacks:** There are absolutely no refunds for services agreed upon. You also agree to no request for any chargebacks. Should a problem arise, you agree to consider resolution within 30 days of the start date.
- **Confidentiality:** Genesis Preferred Solutions promises to keep your information confidential. Our review of your documents is for the betterment of your business or the submission to any State or Agency for the purposes of this Agreement. We will not share your information with a third party.
- **Cancellation Policy:** There are absolutely no refunds. Once we agree upon services, and payment is rendered, our Review team begins work on your file immediately.
- **Additional Services:** All requested documents from the Checklist are mandatory unless otherwise specified. Recreation of resumes and/or Business ancillary documents will require an additional fee (Articles, Operating Agreements, Minutes, Stock/Member Certificates, and ledger). If requested, the Client will be invoiced for additional fees for these items (if needed, requested, or necessary).
- **Warranty for Services:** All applications or information is submitted based on the information you provide. Should it be investigated and determined by the Agency that false, inaccurate, or incorrect information has been provided, it is the Agency's determination to refuse, reject, deny, or issue an approval for Certifications. Genesis Preferred Solutions cannot override the Agency's decision.

By signing, you agree to all terms contained within.

by \_\_\_\_\_(signature)    Print Name\_\_\_\_\_

Date\_\_\_\_\_



## GENERAL POWER OF ATTORNEY

STATE OF \_\_\_\_\_  
COUNTY OF \_\_\_\_\_ KNOW ALL MEN BY THESE PRESENTS:

That I, \_\_\_\_\_ of \_\_\_\_\_ (*name of Business or Corporation*) hereby request that **Genesis Preferred Solutions** and/or its agents, representatives or consultants to be my duly and lawfully appointed attorney in fact granting unto said attorney, in fact, the full power and authority to review and prepare documents and speak on my/our behalf in regards to certifications: Minority Business Enterprise, Woman Business Enterprise, Historically Underutilized Business, Veteran/Service Disabled Veteran Business Enterprise in regards to acts pertaining to the discussions, communications and submission of paperwork on my/our behalf done in furtherance of my interests, whether said acts involve, granting unto my attorney in fact a universal power of attorney permitting said attorney, in fact, to act as fully and for all intents and purposes as I might do if I were personally present. Said attorney in fact is empowered to use their sole discretion in handling matters relating to my interests.

Contractor licensing services: May this Power of Attorney serve as the client or customer giving Genesis Preferred Solutions full permission to submit applications, and registrations and act on behalf of said company in the completion of this task of obtaining licensing from city, county, or state agencies.

The universal power of attorney will supersede my disability to the fullest extent possible for the laws of the State of \_\_\_\_\_

Witness my hand this date and with my signature:

Date: \_\_\_\_\_ Signature \_\_\_\_\_

Date \_\_\_\_\_ City of \_\_\_\_\_ State of \_\_\_\_\_ County of \_\_\_\_\_

On this day before me appeared (name) \_\_\_\_\_ with proper identification, who being duly sworn, did execute the foregoing affidavit and did aver that he or she was properly authorized by (name of firm) \_\_\_\_\_ to execute this affidavit and did so as his or her free act/deed.

(SEAL)

\_\_\_\_\_  
Notary Public