

GENESIS PREFERRED
SOLUTIONS



800-718-2425
CALL US!

CLIENT AGREEMENT

2023-2024



ABOUT US

Genesis Preferred Solutions is a small business niche company specializing in business development, sustainability, impactful growth opportunity programs, government contracting, and preparation services for Certifications as a Small, Minority, Woman, Veteran, and/or Disadvantaged business. Our objective is to assist small businesses to leave their vital footprint on the US economy and beyond.

Our services allow smaller companies to get out of their own way, find multi-million dollar opportunities that will grow, and build their own brands toward a national and recognizable force in their industry.

Our services include:

- Structure: LLC, Corporations, etc.
- Certifications: MBE, WBE, SBE, DBE and VBE
- Government Contracts
- Publishing
- Mentoring & More



800-718-2425



CERTIFICATIONS

100% Success Rate

We review, audit, prepare, and submit applications on your behalf to the applicable Agencies. We speak and respond on your behalf. There's nothing more you have to do! We are proud to acknowledge that we have a 100% success rate since 2000.

Types of Certifications

There are certain Certifications that are best for your company. Contact our office and speak with our knowledgeable Consultants who will recommend certifications best suited for your business and the opportunities available. Remember! The government buys

E-V-E-R-Y-T-H-I-N-G



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 your a personal/private link. Or, via email, fax, or US mail. **No pictures, JPG, or PNG files are allowed.**

Genesis Preferred Solutions
P.O. Box 201272, Arlington, TX 76006
(334-694-2138)

- 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/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 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.

Initial here _____

Genesis Preferred Solutions

M/WBE Certification Experts, Consultants & Mentors



STEP 5

- A SITE-VISIT may occur. Should the Agency request this, please provide dates and times of availability. The Agency will either perform a physical Site Visit of where you operate your business or via a virtual video conference. They will ask you questions about your business and operations. Their questions will be relevant to the information on your application (copies are sent to you once Notarized). Any changes in your business you express at the time of the SITE VISIT VOIDS our involvement of your application and absolutely no refund will be provided for any reason.
- 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 and are non-refundable. 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

Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):
	<input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate	Exempt payee code (if any) _____
	<input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.	Exemption from FATCA reporting code (if any) _____
	<input type="checkbox"/> Other (see instructions) ▶	(Applies to accounts maintained outside the U.S.)
	5 Address (number, street, and apt. or suite no.) See instructions.	Requester's name and address (optional)
6 City, state, and ZIP code		
7 List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Social security number	
<div style="border-bottom: 1px solid black; width: 100%;"></div>	<div style="border-bottom: 1px solid black; width: 100%;"></div>

or

Employer identification number	
<div style="border-bottom: 1px solid black; width: 100%;"></div>	<div style="border-bottom: 1px solid black; width: 100%;"></div>

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here

Signature of
U.S. person ▶

Date ▶

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
 - Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
 - Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
 - Form 1099-S (proceeds from real estate transactions)
 - Form 1099-K (merchant card and third party network transactions)
 - Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
 - Form 1099-C (canceled debt)
 - Form 1099-A (acquisition or abandonment of secured property)
- Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

www.GenesisPreferred.com



800-718-2425

CONTRACTS & RFP'S

RECEIVE BID OPPORTUNITIES

The next step after applying for your M/WBE Certifications is to get your business registered as a vendor with every city, county, state, school district, college, university and Fortune 500 Company who participates in the program by having long-term contracts for your business.

CAPABILITIES STATEMENT

There are opportunities less than \$25K where you won't have to submit a bid. JUST WALK IN AND ASK FOR THEM! You will need a Capabilities Statement, the correct NAICS, and the verbiage to walk with a contract WITHOUT BIDDING.

Genesis Preferred Solutions

M/WBE Certification Experts, Consultants & Mentors



Getting your Certification is the first step at positioning your business to receive long-term, lucrative contracts from the government, school districts, colleges, universities, and Fortune 500 companies; however, in order to gain access to the opportunities, you must be REGISTERED!

Allow us to get your company registered with 60 entities so you can:

1. Receive emailed bid solicitations
2. Gain access to opportunities
3. Receive no/bid or below threshold opportunities
4. Bid on multi-million dollar opportunities that will grow your company substantially.

Genesis Preferred Solutions is your leader and expert in M/WBE Certifications, set-asides, compliances and transforming small businesses by educating them on the advantages of their Certifications since 2005.

One of the primary reasons why our M/WBE's fail to gain access to opportunities is the fact that no one has informed them on how to leverage and take full advantage of their Certifications. Whether you are a PRIME or SUBCONTRACTOR, you want Business! You've prepared and positioned your business for more government opportunities; yet, you have not managed to receive them.

FUN FACT: In Texas, there are 1216 cities in Texas and 254 counties. Each City or County who participates in the M/WBE program has their own vendor registration portal. QUESTION: HOW MUCH TIME WOULD IT TAKE TO REGISTER YOUR BUSINESS MORE THAN 1400 TIMES?

Allow Genesis Preferred to put your M/WBE/DBE/HUB certification to good use. Allow us to register your business to receive bid solicitations and/or gain access to locate them from governmental and Fortune 500 companies. We will list your business with agencies so that you may receive solicitations.



Leverage your Certification

Our Services include:

1. Targeted national bid portals
2. Governmental agencies (50): Cities, Counties, School District
3. Fortune 500 companies (10)
4. Capabilities Statement

We stand ready to assist you by leveraging your Certifications. Once you remit payment, we will ask for your Capabilities Statement (if you do not have one, the price above includes our creation of yours), copies of your Certifications, and a signed W9.

Yes! I'm ready to receive a Contract

Registering your company is a 3-step process. Once we get started, we will need your cooperation to forward all emails to our attention as they are time-sensitive.

We will provide you with all login credentials and proof of registration once we have completed our process.

By signing this document, you agree to the terms of the process and that there are absolutely no refunds.

Name

Signature

Date

Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.		
	2 Business name/disregarded entity name, if different from above		
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):	
	<input type="checkbox"/> Individual/sole proprietor or single-member LLC	<input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate	Exempt payee code (if any) _____
	<input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____		Exemption from FATCA reporting code (if any) _____
	<input type="checkbox"/> Other (see instructions) ▶ _____		(Applies to accounts maintained outside the U.S.)
	5 Address (number, street, and apt. or suite no.) See instructions.	Requester's name and address (optional)	
6 City, state, and ZIP code			
7 List account number(s) here (optional)			

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number										
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		-								

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ▶	Date ▶
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

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- Form 1099-DIV (dividends, including those from stocks or mutual funds)
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 - Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
 - Form 1099-S (proceeds from real estate transactions)
 - Form 1099-K (merchant card and third party network transactions)
 - Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
 - Form 1099-C (canceled debt)
 - Form 1099-A (acquisition or abandonment of secured property)
- Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.



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 registering your business as a vendor with local city, county, state, school districts, and other entities to receive bid solicitation information for contracting opportunities. This Power of Attorney gives us permission to communicate with those entities in providing your personal and business information only for the sake of registration only.

Our obligation is 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

WE ARE YOUR CONTRACT DEPT.

Genesis Preferred Solutions
M/WBE Certification Experts, Consultants & Mentors



WIN CONTRACTS

Locate RFP's

Respond for you

Submit Bid

Can't Win if you don't Bid

Professional Services only. Only qualified businesses will be accepted.
3 RFP submissions per month into digital portals only.



More information call us
800-718-2425



www.Genesispreferred.com
VISIT OUR WEBSITE



www.GenesisPreferred.com

www.GenesisPreferred.com



800-718-2425

PUBLISHING

GET YOUR BOOKS PUBLISHED ON
AMAZON

CRB Publishing is a division or subsidiary of Genesis Preferred Solutions. We specialize in getting your creative works published on Amazon.

Genesis Preferred Solutions

M/WBE Certification Experts, Consultants & Mentors



Your written masterpiece is ready for the world to read! Let us get your book published on Amazon.

Here some of the books we love to get published:

- Novels (6x9)
- Fiction
- Non Fiction
- Religious
- Business
- Artwork
- Workbooks (8.5x11)
- Planners
- Affirmation Calendars
- Educational Study guides
- Surveys and Assessments
- E-books (Kindle)

CRB Publishing would love to assist you in publishing your next book. Here is what we offer:

- Reviewing your FRONT BOOK cover for accuracy
- Reviewing your BIOGRAPHY and highlights of your book for accuracy
- Obtain copyrights and ISBN Numbers
- TYPESET both FRONT/REAR BOOK COVERS
- Slight Review of your INTERIOR BOOK CONTENT for minor errors only
- Upload your COVERS to Amazon
- Upload your INTERIOR BOOK CONTENT to Amazon
- Pricing your book to Amazon
- Provide you with 12 actual copies

Here is what is needed from you:

1. Front Book cover designed
2. Name of Book cover designer for recognition
3. Photograph of author
4. Name of the Author and any co-authors
5. Name of any clothing or photography designer for recognition
6. Biography and book highlights to design REAR COVER
7. Interior Content of the book for minor errors review

By signing this document, you agree to the terms of the process and that there are absolutely no refunds.

Name

Signature

Date