

Credentials with Credibility™



**BlocSynergy**  
Validating Credential Compliance

# BlocSynergy × Pilot Partner

---

## POTENTIAL PARTNERSHIP FRAMEWORK

CONFIDENTIAL & PROPRIETARY – © 2025 BLOCSYNERGY LLC,  
THIS PRESENTATION AND ITS CONTENTS ARE CONFIDENTIAL  
AND INTENDED SOLELY FOR THE RECIPIENT. ANY  
UNAUTHORIZED REVIEW, USE, DISCLOSURE, OR DISTRIBUTION  
IS PROHIBITED. ALL INTELLECTUAL PROPERTY RIGHTS,  
INCLUDING TRADE SECRETS, ARE OWNED BY RESERVE PRICE  
MARKET, LLC

Vince Perez  
BLOCSYNERGY LLC | NAPLES FLORIDA

## Contents

Introduction .....	2
BlocSynergy™ x <b>PP</b> : Partnership Framework.....	3
<b>PP</b> – BlocSynergy's Initial Test Market .....	5
Assumptions for <b>PP</b> Pilot Market .....	7
Why This Matters for Investors .....	8
Pilot Revenue Model .....	8
BlocSynergy™ – MVP Milestones Roadmap for Investors.....	9
Realistic Goals .....	11
Why we suggested \$5,000/month for Sentinel AI .....	13

## Introduction

### Pilot Market Invitation – **Pilot-Partner (PP)**

Leading providers of legal and continuing education have built trust by delivering knowledge at scale. But in today's compliance-driven world, the challenge is not just teaching — it's proving. BlocSynergy™ is building the **trust infrastructure for credentials** — doing for professional verification what credit bureaus did for finance. Just as credit bureaus made it possible to instantly assess financial trustworthiness, BlocSynergy™ enables every CE credit to be **born verified (Born Verified™)**, tamper-proof, and compliance-ready.

As a **Pilot Program Partner (PP)**, your organization will gain **exclusive fee-free access** to BlocSynergy's platform, helping shape the roadmap, influence feature development, and secure a **first-mover advantage** in verified credentialing. Beyond market leadership, pilot partners may also qualify for an **early equity stake**, aligning directly with BlocSynergy's long-term growth strategy.

Together, you deliver the learning; BlocSynergy™ ensures those credentials live securely beyond the classroom — portable, recognized by regulators and employers, and resistant to fraud. This collaboration establishes a **new standard of professional trust**, reduces the burden of compliance reporting, and gives attorneys a **secure, portable portfolio of their professional development**.

Participation in the pilot is more than adoption of a platform — it's an opportunity to **define the standard for the next era of credentialing**. Just as credit bureaus reshaped global finance, BlocSynergy™ is positioned to reshape how professional trust is measured across law, healthcare, insurance, and other regulated industries.

## BlocSynergy™ x PP: Partnership Framework

### 1. Integration at the Source (Authorization + Issuance)

- **PP as Issuer:** Every CE course completion or credential issued by **PP** is logged into BlocSynergy's **Guardian™ ledger**.
- **Authorization Alignment:** State Bar Associations and Mandating Authorities define verifiable data points in BlocSynergy™ during the Authorization Phase, so **PP**-issued credits are "**born verified™**".
- This eliminates fraud (e.g., fake CE certificates) and creates **instant compliance-ready credentials**.

### 2. Credential Portability for Professionals

- Lawyers completing **PP** courses receive **CredenShield™ digital badges** backed by BlocSynergy's blockchain.
- These portable credentials can be shared with **law firms, insurers, clients, or regulators** — much like a credit report — but for professional reliability.
- Ensures attorneys never lose track of CE credits, renewals, or compliance status.

### 3. Compliance Reporting for State Bars & Employers

- **Automated Submissions:** BlocSynergy™ pushes verified CE completions directly from **PP** to **state bar systems** and **law firm HRIS systems**.
- **Real-Time Oversight:** Regulators see compliance dashboards powered by **Sentinel AI™**, which flags lapses or anomalies.
- This reduces administrative overhead for **PP**, state bars, and law firms.

Continues...

#### 4. Business Model Alignment

- **PP Value Add:** Differentiates **PP** from other CE platforms by offering **tamper-proof, instantly verifiable credentials** — giving lawyers “proof of compliance” in real time.
- **BlocSynergy™ Revenue:** Transaction fees on verified credential logs; SaaS fees for regulatory dashboards; API integration for **PP** institutional partners.
- **Joint Upsell:** Premium subscription for firms or regulators to track compliance across all professionals in their network.

#### 5. Strategic Benefits

- **For PP:** Increases trust in its CE programs, adds defensible innovation, and strengthens relationships with State Bars.
- **For BlocSynergy™:** Immediate access to **PP** network of **hundreds of thousands of attorneys** and regulatory bodies across all 50 states.
- **For Investors:** Accelerates **first-market dominance** in law — a beachhead market worth billions.

#### Pilot Program Benefits – Shared Value Creation

<b>Value to Partner</b>	<b>Value to BlocSynergy™</b>
Fee-free access to BlocSynergy’s credentialing platform during the pilot	Demonstrates product viability in a high-value test market
First-mover advantage in verified credentialing	Access to large CE participant base (e.g., 1.2M attorneys via PP, Barbri, or similar)
Influence to shape the roadmap and feature development	Real-world data for Guardian™, Sentinel AI™, and CredenShield™
Showcase innovation to regulators, employers, and attorneys	Demonstrates ecosystem adoption (issuer, authority, credential holder)
Positioning as industry leader in the new standard of credentialing	Builds strong case study for expansion into healthcare, insurance, and other regulated industries
Potential for early equity stake, aligned with BlocSynergy’s growth	Secures trusted founding partners for defensible scaling

## PP – BlocSynergy's Initial Test Market

For a **test market** like **PP (legal CE)**, we'll want a **tiered fee structure** that's attractive to **PP** while proving BlocSynergy's monetization model is scalable and defensible. Here's a breakdown by product:

### **Proposed Fee Structures for PP Test Market (waved- no charge for PP)**

#### **1. Guardian™ — Blockchain Credential Ledger**

*Role:* Logs and immutably records every CE credential issued by **PP**.

*Fee Model:* **Per-Credential Logging Fee**

- **\$0.50–\$1.00 per credential issuance** (volume discounted at scale)
- **PP** can bundle this into course fees as an invisible add-on.
- Provides recurring transaction-based revenue that scales with CE volume.

#### **2. Sentinel AI™ — Oversight, Fraud Detection & Compliance Monitoring (waved- no charge for PP)**

*Role:* Runs AI checks on **PP**-issued credentials, detecting fraud, ensuring regulatory alignment, and monitoring expiration risks.

*Fee Model:* **SaaS Subscription + Compliance Per-Check**

- **Institutional SaaS License:** \$2,500–\$10,000/month (based on seat/volume tier for **PP** + affiliated institutions)
- **Compliance Checks:** \$0.25–\$0.50 per credential analyzed for fraud/expiry risk
- Optional premium package for state bar regulators with dashboards.

Continues...

### **3. CredenShield™ — Digital, Portable Credential Badge**

*Role:* Portable, tamper-proof CE credential for attorneys, shareable with law firms, regulators, insurers.

*Fee Model: Freemium + Premium Upgrade*

- **Freemium:** All attorneys receive basic blockchain-verified credential badge.
- **Premium Upgrade:** \$20–\$50/year per attorney for enhanced portfolio features (multi-credential wallet, alerts, profile integration with LinkedIn, law firms, or insurer portals).
- Institutional license option: firms pay for employees' premium upgrades in bulk.

#### **Strategic Rationale for PP Pilot**

- **Low-friction entry:** PP pays Guardian fees per credential, passing cost into existing course fees seamlessly. (**waved- no charge for PP**)
- **High-value upsell:** Sentinel provides recurring SaaS + compliance check revenue to PP, law firms, and regulators.
- **Network effects:** CredenShield creates direct engagement with professionals, building a portable trust layer across the ecosystem.

This model ensures **transactional revenue (Guardian)**, **recurring SaaS (Sentinel)**, and **direct-to-professional monetization (CredenShield)** — mirroring how credit bureaus make money from both institutions and individuals.

## Assumptions for PP Pilot Market

- **Credential Volume:** 500 attorneys completing **5 CE courses each** in a year → **2,500 credentials** issued.
- **Institutional Partners:** 1 issuer (**PP**) + 1 regulator (State Bar Association).
- **Professional Adoption:** 30% of attorneys (150 users) opt for **CredenShield premium upgrade**.

## Revenue Breakdown

### 1. Guardian™ (Blockchain Credential Ledger)

- Per-credential logging fee: \$0.75 avg.
- 2,500 credentials × \$0.75 = **\$1,875**

### 2. Sentinel AI™ (Fraud/Compliance Monitoring)

- SaaS license for **PP**: \$5,000/month = **\$60,000 annually**
- Compliance check fee: \$0.30 per credential × 2,500 = **\$750**
- **Total Sentinel Revenue: \$60,750**

### 3. CredenShield™ (Digital Badge + Premium Wallet)

- Base badge: Free for all attorneys (2,500 issued).
- Premium upgrade: 150 attorneys × \$30/year = **\$4,500**

## Total Projected Pilot Revenue

- **Guardian™: \$1,875**
- **Sentinel AI™: \$60,750**
- **CredenShield™: \$4,500**

**Grand Total: ~\$67,125 (Year 1 pilot revenues)**

## Why This Matters for **Investors**

- Even at **small-scale pilot levels**, Sentinel AI™ drives **high-margin recurring revenue**.
- Guardian™ proves **transactional scalability** (grows with CE volume).
- CredenShield™ builds the **direct-to-user engagement layer**, seeding network effects.
- Scaling to **10,000+ attorneys** (just ~1% of U.S. lawyers) → revenues quickly cross **\$1M+ annually**.

**Pilot Revenue Model** with Sentinel AI split into **flat license + usage fees**:

**PP Pilot Market (500 attorneys × 5 CE courses each = 2,500 credentials)**

Product	Pricing Model	Calculation	Total Cost
Guardian™	Per-credential logging	2,500 credentials × \$0.75 per credential	\$1,875
Sentinel AI™	Flat license	Baseline \$5,000/month SaaS fee	\$60,000
Sentinel AI™	Usage-based checks	2,500 credentials × \$0.30 per compliance check	\$750
Sentinel AI™	Total	-	\$60,750
CredenShield™	Premium users 30% of attorneys (150 users)	150 attorneys × \$30/year	\$4,500

**Grand Total Pilot Revenue: ≈ \$67,125**

This shows investors that Sentinel AI drives **predictable ARR (flat fee)** while also capturing **scalable upside (usage fees)** as credential volumes grow.

## BlocSynergy™ – MVP Milestones Roadmap for Investors

### Objective

Prove the viability of BlocSynergy's credentialing platform by demonstrating end-to-end lifecycle functionality, real-world adoption, and measurable impact in a test market (legal CE via **PP**).

### Phase 1: Foundation (0–6 Months)

#### Build Core MVP Modules

- Guardian™ ledger for credential issuance & blockchain logging
- CredenShield™ wallet for portable credential display
- Sentinel AI™ prototype for anomaly detection

#### Pilot Partnership Secured

- Signed **MOU** with **PP** as issuing agent
- LOI from **one State Bar Association** as mandating authority

### Phase 2: Test Market Pilot (6–12 Months)

#### Pilot Goals

- Log **500+ CE course completions** from **PP** into Guardian™
- Issue **CredenShield™ badges** to participating attorneys
- Demonstrate **Authorization → Issuance → Submission → Validation** workflow

#### Sentinel AI Demo

- Detect at least **2–3 anomalies** (expired, duplicate, or fraudulent credentials)
- Deliver regulator dashboard showing real-time compliance insights

## **Phase 3: Proof of Market Fit (12–18 Months)**

### **Adoption Metrics**

- **100–200 attorneys** actively using CredenShield™ badges
- **One law firm or insurer** integrates verification API
- **Institutional SaaS pilot** with **PP** and regulators (compliance monitoring)

### **Revenue Validation**

- Transaction fees via Guardian™ credential logging
- Subscription/licensing fees for Sentinel AI dashboards
- Premium upgrades for CredenShield™ wallets

### **Investor Takeaway**

This MVP roadmap demonstrates:

- **Defensible differentiation** (credentials “born verified” at authorization)
- **Ecosystem adoption** across issuers, holders, and regulators
- **Revenue pathways validated** before Series A scaling

**BlocSynergy™ is positioned to become the credit bureau for credentials — and this MVP proves it.**

Continues...

## Realistic Goals

### 1. End-to-End Credential Lifecycle Pilot (Proof of Workflow)

- Demonstrate the **Authorization** → **Issuance** → **Submission** → **Validation** phases for a small but real set of credentials.
- Example: Work with **PP** and a **State Bar Association** to log **100–500 CE course completions** on BlocSynergy™.
- Outcome: Investors see that credentials are “born verified” and flow through the system seamlessly.

### 2. Immutable Credential Ledger (Guardian™) in Production

- Show that **credentials are logged immutably** on blockchain and retrievable via unique IDs.
- Target: At least **one institutional integration** (e.g., **PP** or similar CE provider).
- Outcome: Proof that the platform can securely anchor data at scale.

### 3. Fraud Detection / Compliance Alerts (Sentinel AI™)

- Demonstrate Sentinel AI detecting **at least 1–2 cases of anomalies** (e.g., expired credential, duplicate attempt, or forged entry).
- Outcome: Investors see the **AI layer adds real value** beyond simple digital badges.

### 4. Portable Digital Credentials (CredenShield™)

- Deliver a working **CredenShield™ wallet/badge** to professionals that can be shared with an employer or regulator.
- Target: **100–200 professionals** receiving and using portable credentials.
- Outcome: Shows **user engagement** and portability beyond a single issuing body.

## 5. Institutional/Regulatory Buy-In

- Secure **one pilot agreement** with **PP** (issuer) and **one letter of intent (LOI)** from a State Bar Association (mandating authority).
- Outcome: Investors see ecosystem adoption — issuers, authorities, and holders are all engaged.

### Investor-Friendly Framing

Our MVP doesn't need to conquer the market. It needs to prove that:

- **Credentials can be born verified at the source** (unique differentiator vs. competitors).
- **The full lifecycle works in practice** with a real institution.
- **Stakeholders find value** (issuers save cost, regulators get compliance clarity, professionals gain portable trust).

In practice: A realistic MVP milestone for BlocSynergy™ would be **logging 500+ PP CE completions into Guardian™, issuing CredenShield™ badges to those attorneys, and showing regulators Sentinel AI dashboards flagging compliance gaps.**

Continues...

Why we suggested \$5,000/month for Sentinel AI™ and how it can be rationalized for investors:

### 1. Benchmarking Comparable SaaS Compliance Tools

- In regulated industries (law, healthcare, finance), **compliance & monitoring SaaS licenses** often run in the **\$2,000–\$15,000/month range** for institutions, depending on volume and scope.
- Examples:
  - Healthcare compliance dashboards (HIPAA/GRC) → \$3,000–\$7,000/mo
  - Legal discovery/monitoring platforms (Relativity, Everlaw) → enterprise tiers at \$10,000+/mo
- \*PP is an **enterprise-scale platform** serving thousands of attorneys → positions it at the **midpoint (\$5,000/mo)** for pilot pricing.

### 2. Value Justification

- Sentinel AI is not just storage; it:
  - Detects fraud & anomalies (value = risk reduction)
  - Automates reporting to regulators (value = time savings & reduced fines)
  - Provides **real-time dashboards** for State Bars (value = compliance assurance)
- Even **one prevented compliance lapse** could save a firm or regulator tens of thousands in penalties → \$5,000/month becomes cost-effective.

### 3. Strategic Pricing Logic

- **Pilot Price Point (\$5k/month):** Low enough to reduce friction for early adoption, high enough to prove SaaS value.
- **Scalable Tiers** (as you grow):
  - Small Issuer/Institution: \$2,500/mo

- Mid-tier (like **PP**): \$5,000–\$7,500/mo
- National/Regulator-level: \$10,000–\$15,000/mo

**Sentinel AI™ is the revenue engine that will scale recurring revenue across verticals.**

### Sentinel AI™ – Tiered Pricing Model

Tier	Target Customers	Features	Monthly Fee
Small	CE providers, small firms	Basic credential monitoring Dashboard access Up to 2,000 checks/month	\$2,500 / month
Mid	Large CE platforms (e.g., BARBRI), regional regulators	Full compliance dashboard Fraud/anomaly detection 10,000 checks/month	\$5,000 – \$7,500 / month
Enterprise	National regulators, large institutions	Advanced analytics & integrations Unlimited checks Premium support & API access	\$10,000 – \$15,000 / month