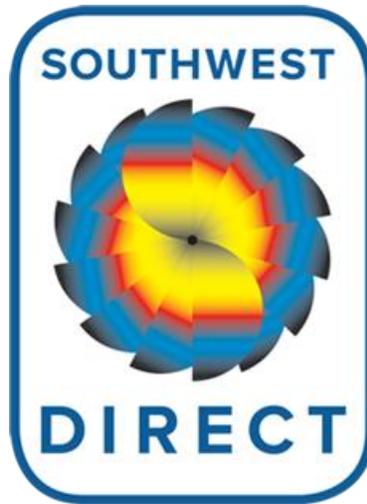


**SouthWest Direct is now part of InfoSend, Inc.**



## SouthWest Direct is now part of InfoSend, Inc.

Dear Valued Customer,

For over the past 30 years, my family and I have worked hard to build an organization dedicated to serving our clients and creating value. With mixed emotions, I am heading into retirement and have found another great family business to assist me in carrying this legacy.

**I am proud to announce a partnership through the acquisition of SouthWest Direct's transactional mail assets and business operations by InfoSend, Incorporated, a trusted name and premier provider of customer communications in the industry.**

Founded in 1996, InfoSend is a privately held, family-owned business with strong financial stability. InfoSend's mission is to provide the best possible Customer Communications Management platform while maintaining a client-focused company culture. Rest assured that our customers will experience almost no change: the partnership will meet or exceed operational consistency, production quality, and excellent customer service, as well as continuity with daily points of contact.

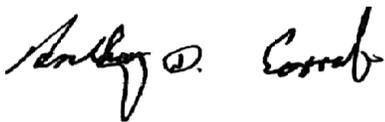
**- Anthony Correnti**

InfoSend delivers more than 200 million print and electronic documents on behalf of its clients annually, coupled with consumer engagement services to drive remittance process via web, IVR and SMS payment solutions. We serve multiple industries with a heavy focus in utilities, local government and healthcare, as well as other markets. InfoSend represents over 550 clients nationwide in 46 states, including nearly 20 clients and managed utilities in the state of Florida and distributes documents to every state in the U.S. from facilities located in Anaheim, CA, Dallas, TX, Chicago, IL, and will continue operations in the Fort Myers area.

We are excited to add our combination of experience, assets and technologies to the existing service you receive today. The SouthWest Direct and InfoSend teams assure you that your business is extremely important to us, and your success is our top priority. We are committed to providing you with quality customer communications solutions to meet your present and future needs.

At InfoSend, we look forward to continuing the lasting relationship that SouthWest Direct has built with you over the years and enhancing your experience with InfoSend's unique capabilities.

**- Mahmood Rezai**



Anthony D. Correnti, Sr.  
Chief Executive Officer  
SouthWest Direct, Inc.



Mahmood Rezai  
Chief Executive Officer  
InfoSend, Inc.

For any questions, please reach out to Marty Bielecki, President of Sales, SouthWest Direct, at (239) 247-4419 / [marty@swdirect.com](mailto:marty@swdirect.com) or Russ Alberti, Director of Sales, InfoSend, at (714) 993-2690 ext. 240 / [russ.a@infosend.com](mailto:russ.a@infosend.com).

## Additional Acquisition Information

InfoSend is acquiring SouthWest Direct's operations related to transactional printing and mailing of documents.

### ***Who is InfoSend?***

Founded in 1996, InfoSend is a privately held, family-owned business with strong financial stability. InfoSend's mission is to provide the best possible Customer Communications Management platform while maintaining a client-focused company culture. InfoSend assists clients in delivering more than 200 million print and electronic documents annually, coupled with consumer engagement to drive remittance process via web, IVR and SMS payment solutions. InfoSend serves multiple industries with a heavy focus in utilities, local government and healthcare, as well as other markets. InfoSend serves over 550 clients across the country and distributes documents from facilities located in Anaheim, CA, Dallas, TX, Chicago, IL, and will continue operations in the Fort Myers area.

### ***Why did InfoSend acquire SouthWest Direct?***

SouthWest Direct's ownership has decided to move on from operating the business. In searching for the best outcome for its existing client base, SouthWest Direct's ownership sought a partner with similar clients, corporate structure and the ability to offer additional services. Most importantly, it was key to find a partner with exceptional Client Services, and InfoSend's history of high client satisfaction and retention made it a perfect fit.

### ***How long will the acquisition take?***

SouthWest Direct and InfoSend aim to complete the acquisition before the end of the year.

### ***What will be the impact of this acquisition on SouthWest Direct's clients?***

There will be no changes to the services provided. InfoSend will be retaining SouthWest Direct staff and will continue to operate in the Fort Myers area. Because of InfoSend's size, capabilities, and experience with similar client outputs, we expect to meet and exceed client business requirements.

### ***What new optional products or offerings does InfoSend have that SouthWest Direct doesn't already offer?***

InfoSend brings several new service offerings that help to extend SouthWest Direct's current print and mail product suite. The following provides an overview of InfoSend's Customer Engagement focused services.

## InfoSend - A Complete Customer Engagement Provider

- **Billing & Payments**
- **Unparalleled Client Support**
- **Multi-Channel Customer Engagement: Web, Mobile, Print, Bank BillPay**



### InfoSend's Mission

InfoSend's goal is to provide the best possible Customer Engagement solution in an accurate, reliable, and timely manner - with an unparalleled client support culture that emphasizes personal touch.

### Get to Know InfoSend - A Reliable Partner

InfoSend has provided business process outsourcing services since 1996, handling the processing and distribution of 185 million critical documents annually for industries throughout the United States. Utilizing the most current technology, InfoSend's Customer Engagement platform offers a single source provider to reach customers with effective and timely interactions.

InfoSend's Customer Communications Management (CCM) platform distributes critical documents across multiple channels, including InfoSend's own manufacturing environments in California, Texas, and Illinois for Data Processing, Printing, and Mailing (DPPM). InfoSend's hosted Electronic Presentment and Payment (EBPP) applications drive the customer remittance process with web, IVR and SMS payment solutions. The cloud-based, Software as a Service (SaaS) approach allows InfoSend to refine offerings without client-side installed software or maintenance, as well as providing for flexible integrations to existing systems or vendors.

Integrity is at the core of InfoSend, with a stated goal to retain and provide complete satisfaction for each client. InfoSend has over 130 employees across multiple states, and the company culture has led to high employee retention, affording clients familiarity and quality service. From our internal operations, to how we support our valuable clients, InfoSend's client-focused service has led to an industry leading client retention and satisfaction rate.

## Overview of InfoSend Products and Services

InfoSend is a client-focused, single-source provider of comprehensive Customer Engagement and Billing solutions.

### CCM: Customer Communications Management with a Single Platform

- ❑ **Multi-Channel Distribution:** one data processing platform manages the import and handling of data files. This core system can then output the information to all delivery channels.
- ❑ **Secure:** upload data via our secure website, FTP with optional PGP encryption, or SFTP into a PCI, HIPAA and SOC audited environment.
- ❑ **Innovative Document Designs:** document redesign consulting – we create your new document look and feel and then our document composition creates bill images for both printed and paperless bills.
- ❑ **Customizable Messaging and Business Rules:** create and schedule document messages by customer type or account number, with paper suppression and distribution workflow completely customizable to meet client need.
- ❑ **Online Proofing, Job and Mail Tracking:** web-based system to track and view samples of print or eBills before they are sent, and monitor the job batch through distribution to the customer.
- ❑ **Detailed Reporting:** a variety of standard reports can be accessed via web portal or emailed to you, including a detailed breakdown comparison of inputs and outputs.
- ❑ **Archiving and Secure Third-Party API Access:** documents can be stored within an InfoSend archive, and may be accessed by clients via an InfoSend portal. InfoSend also has an API available, allowing any vendor the client authorizes to pull customer documents for display.

### DPPM: Data Processing, Print, and Mail Service

- ❑ **Cloud Based Data Processing:** data processing of raw data and print files is done within an InfoSend data center.
- ❑ **High Speed Digital Printing:** print statements, invoices, letters, postcards, notices, or other various documents using laser or inkjet technology: black, grayscale, black plus one or more spot colors, and full color printing are all supported.
- ❑ **USPS Compliance and Automation:** USPS compliant postal presorting is used to drive postage to the lowest available rates, leveraging the Full-Service Intelligent Mail Barcode (IMB) workflow.
- ❑ **Dynamic Customer Messaging:** automated and ad hoc targeted customer messaging capabilities, with dedicated Direct Communications department for production and distribution of marketing, informational inserts, postcard and special mailings.
- ❑ **Fast Service Level Agreements (SLA):** quick turn-around of document folding, inserting, presorting, and delivery to the USPS, with next business day job completion.

### EBPP: Electronic Billing, Payment and Presentment

- ❑ **Multi-Channel Payment Collection:** InfoSend's payment platform provides customer convenience to pay by web, telephone, SMS, CSR, in-person EMV and bank payments.
- ❑ **One-Time and Automatic Payments:** allow customers to quickly make a one-time payment, as well as sign up to have their payment account auto debited with each billing cycle.
- ❑ **Paperless Bill Notification and Presentment:** notify customers via email when a new bill is available, and securely deliver exact replica of printed document to customers inbox or show online via the secure portal.
- ❑ **Mobile-Ready Customer Engagement:** all products are mobile compatible out of the box, with no app store downloads required of customers. Powered by InfoSend's CCM platform, customer specific messaging and payment reminders are delivered electronically.
- ❑ **Interactive Voice Response (IVR):** accept customer payments via automated phone service with InfoSend-hosted phone number, enabling client phone systems to redirect customers with ease.
- ❑ **SMS Text-to-Pay:** enrolled customers may opt in to receive text notifications of new bills, and reply to have the registered payment method drafted for the amount due, speeding up the time to payment.
- ❑ **Bank Payments (MasterCard RPPS):** InfoSend can collect customer payments made via Online Banking and include them within the remittance file alongside other payment channels, saving the headache of processing these as paper checks.
- ❑ **Consolidated Lockbox Reconciliation:** daily report of all payment channels provided in an easy to understand and reconcile format.

## Facilities

InfoSend is located strategically across the nation, ensuring both disaster mitigation and regional access to the USPS.

### **Corporate Headquarters & Western US Production Facility**

4240 E. La Palma Ave

Anaheim CA 92807

Ph: 714.993.2690 Fax: 714.993.1306

InfoSend owns and operates its 102,000 sq. ft. headquarters and Western US production facility. This facility sits on a 4.3-acre lot and is one of the premier bill processing centers in California. This facility acts as the primary data center, provides disaster recovery to the other facilities, and has a 600KW backup generator that can power the entire facility in the event of a grid failure. InfoSend's Anaheim facility is designated as a USPS Detached Mail Unit (DMU) with USPS representatives working on-site.



### **Midwest & Northeastern US Production Facility**

1406 Centre Circle

Downers Grove, IL 60515

InfoSend's 25,000 sq. ft. Midwest production and disaster recovery facility is located just West of Chicago, Illinois. This facility is used to process mail for clients located in the Midwest or Northeast. The Midwest facility also serves as an out-of-state disaster recovery facility for InfoSend's California and Texas facilities. InfoSend Midwest is also a USPS DMU with USPS representatives on-site. As with the Anaheim facility this property is owned by InfoSend's principals.



### **Texas & Southeastern US Production Facility**

1624 W Crosby Road #128

Carrollton, TX 75006

InfoSend's 21,000 sq. ft. Texas Production facility is located near Dallas and is the main production center for clients in the South and the Southeast. This facility also provides out-of-state disaster recovery for InfoSend's other locations.





## MEET THE INFOSEND TEAM

### **Mahmood Rezai, CEO**

Mahmood graduated with a Master's degree in Business Administration from Chapman University in 1979 and has over 20 years in the transactional print/mail/ payments industry. Prior to founding InfoSend in 1996, Mahmood founded and directed Chupan Medical Computer Services. He is a believer in self-sufficiency and excellence within one's craft. Outside of InfoSend, Mahmood can be found on his bicycle, restoring classic cars, or deep-sea fishing.

### **Russ Rezai, President**

Russ helped Mahmood start InfoSend in 1996 while still in high school and stayed involved throughout college. He graduated from the University of California, Santa Barbara, with a Bachelor of Arts degree in Business Economics. Russ has been in the transactional print/mail/payments industry since 2001. He is an avid technologist and has passion for client satisfaction.

### **Roxana Weil, Executive Vice President**

Roxana graduated with a Bachelor of Arts degree from the University of California, Berkeley, and a Juris Doctorate from the University of Washington School of Law. She practiced law in the Bay Area for many years before joining InfoSend in early 2017. Roxana is committed to sustained corporate growth and organizational development. Outside of work, Roxana enjoys trying new foods, seeing live music, and is a travel enthusiast.

### **Matt Schmidt, COO**

Matt graduated from California State University, Chico, with a Bachelor of Arts degree in Business Administration, and received his Master's degree in Business Administration from the University of California, Irvine. He has been with InfoSend since 2007, beginning in the Client Services department. Matt is focused on developing and empowering employees to build long-lasting success for themselves and the organization. When he is not working, Matt enjoys camping and hiking.

### **Russ Alberti, Director of Sales**

Russ graduated from the University of Phoenix with a Bachelor of Science degree in Business Management. He has been with InfoSend since 2009 and is a critical document presentment industry veteran with 24 years history. Russ is responsible for managing InfoSend's direct sales, partner channels and direct communications with a focus on growing InfoSend's market and revenue. When he is not working, Russ enjoys time with his family, sports and outdoor activities.

### **Josue Martinez, Director of Client Services**

Josue graduated from California State University, Fullerton, with a Bachelor of Arts degree in Business Administration. He has been with InfoSend since 2000, beginning in the Mail Operations department. Josue is responsible for all client implementation and support services, overseeing the account management team and dedicated support staff. When he is not working, Josue enjoys snorkeling and traveling.

For a look at InfoSend’s operations, visit the following video:

<https://vimeo.com/364924788>

## InfoSend Experience and References

InfoSend serves more than 550 clients in various industries on over 50 different CIS/HIS/Billing platforms. InfoSend has a strong presence in utilities, government, and healthcare as well as serves several other verticals for critical customer communications. Please note the following as a partial list of clients:

<ul style="list-style-type: none"> <li><input type="checkbox"/> City of Provo, UT</li> <li><input type="checkbox"/> Chester Water Auth, PA</li> <li><input type="checkbox"/> City of Tucson Water, AZ</li> <li><input type="checkbox"/> City of Columbus Water and Light, OH</li> <li><input type="checkbox"/> City of Anaheim, CA</li> <li><input type="checkbox"/> Superior Court of California</li> <li><input type="checkbox"/> Ventura County, CA</li> <li><input type="checkbox"/> Santa Barbara County, CA</li> <li><input type="checkbox"/> City of Joliet, IL</li> <li><input type="checkbox"/> Keys Energy, FL</li> <li><input type="checkbox"/> City of Ocala, FL</li> <li><input type="checkbox"/> County of Prince William, VA</li> <li><input type="checkbox"/> Lafayette Utility Systems, LA</li> <li><input type="checkbox"/> City of Erie, PA</li> <li><input type="checkbox"/> Las Virgenes Water, CA</li> <li><input type="checkbox"/> Cucamonga Valley Water, CA</li> <li><input type="checkbox"/> City of Escondido, CA</li> <li><input type="checkbox"/> City of Corona, CA</li> <li><input type="checkbox"/> Modesto Irrigation Dist, CA</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> San Bernardino Water, CA</li> <li><input type="checkbox"/> Utilities Inc, IL</li> <li><input type="checkbox"/> Wisconsin Public Power Inc</li> <li><input type="checkbox"/> City of Mesquite, TX</li> <li><input type="checkbox"/> Coachella Valley Water, CA</li> <li><input type="checkbox"/> City of South Bend, IN</li> <li><input type="checkbox"/> City of Hot Springs, AR</li> <li><input type="checkbox"/> City of Long Beach, CA</li> <li><input type="checkbox"/> Nationwide Energy Partners, OH</li> <li><input type="checkbox"/> Beaufort-Jasper Water and Sewer Authority, SC</li> <li><input type="checkbox"/> Washington City, UT</li> <li><input type="checkbox"/> San Gabriel Water</li> <li><input type="checkbox"/> Burbank Water &amp;Power</li> <li><input type="checkbox"/> City of Modesto, CA</li> <li><input type="checkbox"/> Turlock Irrigation Dist, CA</li> <li><input type="checkbox"/> City of Clearwater, FL</li> <li><input type="checkbox"/> City of Compton, CA</li> <li><input type="checkbox"/> City of Flagstaff, AZ</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Quality Systems Inc</li> <li><input type="checkbox"/> Pacific Dental Services</li> <li><input type="checkbox"/> Kaiser Permanente</li> <li><input type="checkbox"/> Huntington Hospital</li> <li><input type="checkbox"/> Facey Medical Foundation</li> <li><input type="checkbox"/> CommUnityCare</li> <li><input type="checkbox"/> Emergency Groups Office</li> <li><input type="checkbox"/> MNET Financial</li> <li><input type="checkbox"/> One West Bank</li> <li><input type="checkbox"/> 700 Credit</li> <li><input type="checkbox"/> Southern Wine &amp; Spirits</li> <li><input type="checkbox"/> Sports Car Club of America</li> <li><input type="checkbox"/> Dominion Enterprises</li> <li><input type="checkbox"/> SANDAG (toll roads)</li> <li><input type="checkbox"/> CareTracker</li> <li><input type="checkbox"/> Turner Acceptance Corp</li> <li><input type="checkbox"/> Advance Disposal</li> </ul>
----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

As mentioned, InfoSend serves clients all across the country, including Florida. Below is a partial list of Florida clients:

- |                        |                           |                                              |
|------------------------|---------------------------|----------------------------------------------|
| City of Palm Coast, FL | City of Clearwater, FL    | Town of Jupiter, FL                          |
| Keys Energy, FL        | City of Pensacola, FL     | Utilities, Inc (manages 8 Florida utilities) |
| Martin County, FL      | City of South Daytona, FL |                                              |
| City of Ocala, FL      | City of Port Orange, FL   |                                              |

The information in this document is confidential and is not to be used or disclosed except to the recipient’s employees, officers and agents engaged in evaluating this document.