



## EXECUTIVE SUMMARY

### **cleverDome Cloud Users, cleverDome Members and Provisional Vendors**

Thank you for your interest in cleverDome. We are excited to share additional information with you regarding cleverDome and the next steps to come “under the Dome!™”

#### **WHO IS CLEVERDOME?**

cleverDome, Inc.™ is an Arizona Benefit Corporation (B Corporation) that operates as a Co-Op with Members including software service vendors, custodians, broker/dealers, registered investment advisers, financial advisers and ultimately their investor clients (cleverDome Members and their end users, cleverDome Cloud Users and Provisional Vendors).

Today's cybersecurity challenges are unsolvable because cybersecurity products and services are based on a broken security model. Confidential consumer information is sent, received, stored and accessed on or through the open internet which is unsecure. cleverDome solves the unsolvable with the Dome.

#### **WHAT CYBERSECURITY SOLUTION DOES CLEVERDOME PROVIDE?**

cleverDome has created the first community built and proven model that redefines the standards for protecting the most confidential data and information of consumers in the cloud. cleverDome protects critical data by providing a path forward to take financial services data "under the Dome", i.e. secure and off the open internet.

The “Dome” is a revolutionary model built on a community driven platform that delivers a software defined perimeter (SDP), a logical set of disparate, network-connected participants within a secure computing enclave, for the cloud. Confidential data is hidden from public discovery via the cleverDome secure network, and access is restricted by cleverDome to the specified cleverDome Members and Users, removing confidential client data from public visibility and reducing the surface area for attack.

#### **WHAT MAKES THE DOME SECURE?**

The “Dome” provides the fundamental model for the future of a secure internet: the unification of known secure devices with a secure communication layer and risk management utilizing a common due diligence standard with minimum cybersecurity requirements (the cleverDome Cybersecurity Standards).



Secure Devices: Entry to the Dome is restricted to known secure devices, i.e. devices with end point protection in place with 24/7 monitoring.

Secure Network: In a traditional network data jumps between edges and public internet servers. But under the Dome, data is protected by a private internet where the data goes through a specially configured cloud directly to the destination point using real Military Grade Cybersecurity. The data is fractionalized and dispersed over multiple channels. The result is a private network that is safe, reliable and 10 times faster than a VPN connection.

cleverDome Risk Management: cleverDome acts as a trust broker by provisioning cleverDome Cloud Users and Members to exchange confidential data. Each cleverDome Cloud User must meet the cleverDome Cybersecurity Standards to enter the Dome. cleverDome Members are also required to complete the cleverDome due diligence process.

## **CLEVERDOME SERVICE OPTIONS**

There are 3 options: cleverDome Cloud User; cleverDome Member; and Provisional Vendor. The services, cost and requirements of each are discussed below.

### **cleverDome Cloud Users**

cleverDome offers the **cleverDome Cloud** to financial advisors who are not cleverDome Members, but wish to purchase access to cleverDome's secure cloud network as a faster more secure alternative to VPN connections with vendors.

Once installed the cleverDome Cloud User's data in motion is taken off the open internet existing network infrastructure and "*under the Dome*" where all connections are secured with military grade encryption.

cleverDome offers two (2) options for use of the **cleverDome Cloud**:

#### **Option I: cleverDome Cloud with Endpoint Protection Service and Support (\$21.50 per device per month)**

- Entreda Endpoint Cyber Protection with automated cybersecurity compliance and Support (24x7)
- Implementation of access to Dome upon all known secured devices
- Use of the cleverDome Cloud Secure Network Connectivity to connect to vendors who are cleverDome Vendor Members under the Dome - FREE



- Additional connections to vendors who are not currently under the Dome, but agree to complete the due diligence process and become cleverDome Members (“Provisional Vendor”) \$1 per device per month per Provisional Vendor. Additional monthly charge ceases when Provisional Vendor becomes cleverDome Member.

#### **Option II: cleverDome Cloud Basic Connection (\$15.50 per device per month)**

- **DOES NOT include endpoint protection service, automated device cyber compliance or support**
- **cleverDome Cloud User is responsible for providing endpoint protection for devices that meets cleverDome minimum cybersecurity requirements**
- Implementation of access to Dome upon all known secured devices
- Use of the cleverDome Cloud Secure Network Connectivity to connect to vendors who are cleverDome Members under the Dome - FREE
- Additional connections to Provisional Vendors not under the Dome - \$1 per device per month per Provisional Vendor. Additional monthly charge ceases when Provisional Vendor becomes cleverDome Member.
- Phone support is an additional \$3 per month per device if added after initial contract

**cleverDome Cloud Users** enjoy many benefits including:

- End-to-End, Military Grade Security
- Zero Compromise Network Performance
- Private network that is FASTER than the internet
- Endpoint protection and support for cleverDome Cloud Users choosing the Entreda option

cleverDome Cloud Users complete an order form choosing one of the 2 options and agree to the terms and conditions of use in the cleverDome Cloud User Agreement.

#### **cleverDome Member**

**cleverDome Members** are broker/dealers, registered investment advisers, vendors, custodians who commit to completing the **cleverDome Member Due Diligence** and satisfying the cleverDome Cybersecurity Standards. This includes, at a minimum, providing risk assessments and documents that you already have, and completing the Simplified Due Diligence



Questionnaire which includes questions regarding cybersecurity controls, governance and compliance with the cleverDome Due Diligence and Cybersecurity Standards. For some cleverDome Members, additional due diligence, including on-site visits, documentation or testing, may be required.

Each cleverDome Member pays an initial setup fee as well as an annual administrative/due diligence fee. This is in addition to the software, device and data costs for each cleverDome Member that are included in an invoice detailing the specific costs for the cleverDome Member and its end users.

**cleverDome Members** enjoy all of the benefits of cleverDome Cloud users **plus they receive verified cleverDome Member Due Diligence which is shared with cleverDome Members for free**, eliminating multiple and disparate due diligence processes.

cleverDome Members sign either the Sponsoring Member Agreement for broker/dealers, registered investment advisers and their advisor end users or the Vendor Member Agreement.

### **Provisional Vendor**

**Provisional Vendors** are vendors who are NOT yet cleverDome Members, but agree to go through the process to become cleverDome Members. cleverDome Cloud Users and cleverDome Members may request connections to vendors who are Provisional Vendors. **These connections are NOT under the Dome. Provisional Vendors have not agreed to the cleverDome Minimum Cybersecurity Standards and cleverDome has performed NO due diligence on Provisional Vendors. cleverDome Cloud Users and cleverDome Members assume all liability, risk and responsibility for connections with Provisional Vendors.**

cleverDome Cloud Users and cleverDome Members requesting connections with vendors who are not cleverDome Members assist cleverDome in reaching out to those vendors to initiate the process to become Provisional Vendors.

**Connections to Provisional Vendors are paid by each cleverDome Cloud User or cleverDome Member.** The cost for each Provisional Vendor connection is an additional \$1 per month per device for each Provisional Vendor that is not under the Dome. The additional monthly charge ceases upon the Provisional Vendor completing the due diligence process and becoming a cleverDome Member.



Provisional Vendors may initiate the process to become a cleverDome Member by signing the Vendor Member Agreement, paying the appropriate fees and completing the cleverDome Member Due Diligence and satisfying the cleverDome Cybersecurity Standards. Once a Provisional Vendor completes the requirements, it comes “under the Dome™” and enjoys the full benefits of being a cleverDome Member.

**MORE QUESTIONS? For additional information on how to become a cleverDome Member, cleverDome Cloud User or Provisional Vendor, contact:**

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