



## Smartware Corporation

Smartware Corporation provides the technology engine and integrated data base that powers the interactive internet integration of the Enterprise Concept projects. The Smartware program is uniquely capable of administering the inter-generational data management tasks required by the projects that comprise the 150 year business plan of the Enterprise. Smartware was first released in 1983 and is the longest continuously titled software program in existence. At the time of its introduction it was among the earliest and most innovative PC-based software programs. Smartware successfully integrated communications, word processor, database, and spreadsheet applications on a sturdy platform that performed consistently and well. Smartware was used by a high percentage of the operating businesses in the United States, Canada and the United Kingdom for many years before Microsoft's release of MS Office.

In 2002, one of Smartware's original application development pioneers, Charles Manser, who began using Smartware software in 1984 as an account executive with a Sears Business Systems Center free-standing technology stores selling IBM PC's acquired a controlling interest in Smartware. Soon afterward, John David Halverson, a great American software code writer who was a lead programmer in the development of Microsoft Access joined Smartware as Chief Software Architect. Under the guidance of Mr. Halverson, the original DOS based program was transformed into its current enhanced Windows-based configuration.

Today's Smartware builds on information era changes in the world's economy from a centralized big business model to a decentralized entrepreneurial model of a fast changing, small business based global free market. The seamless integration of Smartware is now combined with a rapid application development capability and coding capabilities in all of the major languages of the world to empower large and small companies to build database functionality themselves to support their individualized and rapidly changing organizational requirements. As a result of its flexibility and dependability, Smartware has been in continuous use, from its inception, by clients around the globe who seek the most productive means to create their own custom integrated data-based applications.

Smartware was acquired by entrepreneur and Enterprise Leader, Lawrence E. Freeman, in 2007 to provide the application development capabilities and the data base capacity required to administer and perpetuate the global integration of the projects of the Enterprise Concept. A unique group of companies have been formed by Mr. Freeman as part of the Enterprise Concept to utilize interactive internet technologies to facilitate global endowment activities that make participants feel better and be more productive. The capacity of Smartware to match application development with the velocity of change requirements of an emerging global free market empowers the Enterprise Concept to implement global projects integrating the financial services industry and the non-profit organizations that provide society's caring infrastructure with the Enterprise mission to facilitate the "Economic Endowment of Everything That Matters".

Four of the applications development pioneers who contributed to the assimilation of Smartware into the businesses of the world during the 1980's have returned to Smartware to contribute their knowledge, experience, and deeply felt admiration for the positive contribution of Smartware, the "little engine that could" to businesses around the world to the development of a global Smartware strategy in support of Enterprise projects under the leadership of Dr. Robert Poon, an industry legend of IBM and Oracle fame.

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Smartware modules are interactive and handle data seamlessly between modules. Smartware has developed three primary custom systems applications to support the implementation of a number of Enterprise Concept projects: a written book planning system, SMRTplanning, to integrate the banking, investment and insurance industries to facilitate the "Economic Endowment of Everything that Matters" for productive individuals, for their families, and for non-profit organizations, a digital and optical input device, SMRTpen, for data entry that eliminates time lost to transcription of hand written forms to data applications, and an innovative email referral system, SMRTconnect, that, for the first time in history creates a consumer approval revenue model allowing consumers to participate in the revenue flows of the free market and share in the profitability of products they use, like, and refer to friends without having to fund equity participation.

## **The SMRTplan© System**

Findings of three decades of research led to the development of annual written capital accumulation and capital distribution plans for productive individuals that quantified research based planning models in their individual circumstances. In addition, written permanent endowment analysis and accumulation plans were developed that quantified institutional planning models for un-endowed non-profit organizations in their individual circumstances. The integration of concept and data and the production of large numbers of custom design written plans require a uniquely flexible and adaptable high speed data base information management platform.

Written book financial planning on the scale utilized by financial services industry participants in the Alliance planning for productive individuals and non-profit organizations also requires integration with a secure and flexible data base system to protect and evaluate financial data and to create annual written capital accumulation and capital distribution plans that quantify the research based planning models for productive individuals, and to create written permanent endowment analyses and accumulation plans that quantify research based planning models for non-profit organizations.

The SMRTplan system was developed by SmartWare exclusively for the Economic Alliance of Associations for use by members of the associations that comprise the membership of the Economic Alliance of Associations. Permanent association members of the Economic Alliance of Associations include the Economic Alliance of Doctors, the Economic Alliance of Business Executives, and the Permanent Endowment Association of America. Alliance Partner members of the Economic Alliance of Associations include insurance companies, investment companies, banks, accounting firms, pension design and administration firms, Alliance Financial Consultants, and Endowment Consultants. These Financial Consultants and Endowment Consultants are specially trained by the Economic Alliance entities. Alliance Financial Consultants collect hundreds of data values using SMRTpen technology that are encrypted and used to complete written book capital accumulation and capital distribution plans that quantify clients' goals in the context of the research based planning models. The confidential data values are integrated by the SMRTplan system into custom designed written planning books that separate data from personal and institutional identity. Recommendations included in the written plans integrate the use of financial services industry products and services by productive individuals and by non-profit organizations. Alliance Financial Consultants are provided access to productive and meaningful careers using the SMRTplan system to help productive individuals



and non-profit organizations. Manufacturers of financial products and Alliance Financial Consultants pay users' fees to Alliance companies in order to access the SMRTplan system.

### **The SMRTpen© System**

Smartware has developed a unique data/image capture application based on Anoto™ technology that is used by Enterprise Financial Consultants to increase their productivity and to better serve their planning clients. The technology is also used by Alliance companies to collect and analyze data and to provide market compliance management oversight. Alliance Financial Consultants use a special digital/optical pen to collect planning data from productive individuals and from non-profit organizations. They then dock the pen at an office PC and automatically upload all of the information to their PC for validation and encryption before being forwarded to secure servers for plan calculation, preparation and publishing. The confidential data values are integrated by the SMRTplan system into custom designed written planning books that separate data from personal and institutional identity.



In addition to the gathering of planning data, the pen is used to enhance the productivity of financial consultants. The loss of time involved in administrative processes involving the human transcription of information written by hand on paper forms can be eliminated with no decrease in accuracy. SMRTpen also provides access to written data enabling management to gather data for marketing and sales analysis and to exercise governance to maintain and enforce user compliance with Alliance policies and procedures. Interest generated in the pen through its use with productive individuals and with non-profit organizations generates projects to increase the productivity of individuals and organizations whose preferred work style involves the use of a pen or pencil and for whom post event data entry is costly and subject to inaccuracy.

### **SMRTconnect©**

SMRTconnect is a consumer approval revenue sharing system that electronically integrates an approving consumer of a product or service of a business into the revenue model for the product or service for the first time in history. Businesses that participate in the SMRTconnect revenue sharing system enable approving consumers of their products and services to share in product revenues by compensating them for purchases of these approved products and services by their personal e-mail contacts.

Approving consumers can also be compensated through SMRTconnect for purchases of the approved products and services by the personal e-mail contacts of their contacts' personal e-mail contacts. E-mail contacts who receive consumer approval e-mail product and service information are blocked by SMRTconnect from receiving e-mail from any other source regarding that specific product or service.

Historically, e-mail has not been an effective medium for commercial activity except as a passive order taking device. SMRTconnect allows consumers to actively participate in referral of valued products or services and provides sellers with a unique view of how referrers work. The system has been actively used to identify satisfied and dissatisfied consumers, to identify



potential business partners and to reward approving consumers for their active advocacy of products and services.