Agenda:

- LCvista – Prolaera History and Why it Matters

- Platform Plans/ Timeline and How they Impact your Firm

- LCvista Demonstration – end users & administrators

- FAQ Regarding the Transition from Prolaera to LCvista

- Open Q&A

LCvista - Prolaera Story

LCvista and Prolaera both founded in 2016 by industry professionals with feedback from top 100 firms

Meet the evolving learning and development needs of accounting firms with compliance accuracy and continuous collaboration.

Built a true community based on collaboration.

Prolæra

★ Robust User-Friendly LMS

★ Compliance Tracking for over 200 jurisdictions

★ Serving 100+ Accounting Firms

LCvista Update | **Company Growth**

⭐ **Inc. 5,000 Fastest Growing Company**

⭐ **Serving 80+ Accounting Firms**
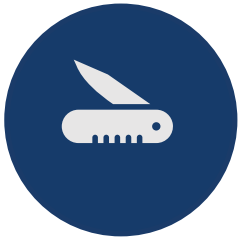
⭐ **19 of the Top 25 Accounting Firms**

LCvista Today

Focus on Accounting Industry. Built by firms just like yours.

All-in-one integrated solution providing the flexibility of choice.

- Product evaluation resulted in LCvista as the "anchor" product

- New features, including key features from Prolaera are being built in LCvista

- Prolaera will continue to be maintained, including compliance rule updates.

- LCvista- Prolaera Task force is in place to plan facilitation of data, training, features and timeline.

- Prolaera firms will transition to the LCvista product over the next 1-2 years.

LCvista Update | A Timeline of the LCvista Platform

Enhancing the Product

- Permissions & Roles
  Venues & Sponsors
  Learning Plans
- Custom Tags
  Modify Notifications
  Scheduled Reports
- Credit Request Workflow
  External Credit Workflow
  Program Invitations
- Firm Compliance
  UI Redesign
  Bulk Uploads
- Program Catalog Views
  Program Thumbnails
  Customizable Dashboard
- Jurisdiction Approval
  eCommerce
  My Learning Hub

Expanding Integrated Providers

Adobe Connect
webex Events (formerly SOCIO)
conferences i/o
ON24
GoTo
GoTo Webinar
zoom
webex by CISCO
Microsoft Teams

Timeline: 2017 — 2018 — 2019 — 2020 — 2021 — 2022

Supporting Content Providers

CCH
skillsoft
Becker
LinkedIn Learning
THOMSON REUTERS CHECKPOINT
AICPA
BDO ALLIANCE USA
lumiQ
SURGENT ACCOUNTING & FINANCIAL EDUCATION

Key Milestones

SCORM Cloud by Rustici Software
Lectora
GDPR
AICPA SOC
pendo

Tracking Jurisdictions

2017	2018	2019	2020	2021	2022
74	86	94	214	369	446

2023 Product Goals

Serve the Accounting Industry

Continuously focus on serving the unique needs of the Accounting industry through our product development and updates.

Deliver a Best-in-Class Platform

Develop a best-in-class core Learning & Development and CPE Compliance Platform that surpasses industry requirements and customer needs.

Prioritize Customer Experience

Excel in customer experience, ease of use, and client satisfaction through continuous integration of user feedback.

Provide Operations at Scale

Streamline internal operations and support to enable sustainable growth for both LCvista and our clients.

Develop a Content Marketplace*

Expand our product suite to address key established Content Marketplace needs in the Accounting space.

Continuously Innovate

Continuously research and identify opportunities for product development and innovation.

What to Expect: Timeline

2023 — Firms may self-select to move to LCvista using a standard implementation process We will work with your team on timing/ availability.

2024 — Implementation will be mostly automated and select Prolaera features incorporated into LCvista. We will work with your team to schedule a transition.

2025 — Remaining customers will transition to LCvista. Prolaera platform will be sunset TBD.

LCvista Demonstration

What to Expect: FAQ

Is there anything changing for me right now?

No. The Prolaera support team is here to support you in the same capacity we have in the past.

Will the CPE rules be maintained in the Prolaera platform?

Yes. Although we are working towards anchoring on the LCvista platform, product functionality and compliance accuracy will be maintained in the Prolaera platform.

Is the Prolaera product going away?

The Prolaera product features and functionality are being incorporated into LCvista. The platform will be sunset only after all customers are successfully anchored on the LCvista platform.

What about Prolaera support?

The Prolaera and LCvista support and leadership teams are working together to provide the best possible customer experience moving forward. More community resources will be available to you over the coming months as a result.

Is pricing changing?

LCvista and Prolaera are priced the same. The current list price for both products is $70 per user per year. Prices are only adjusted on contract renewal, regardless of what product you are using.

What to Expect: FAQ

Will all of the same features be available in the new platform?

We will be implementing the critical Prolaera features on LCvista to ensure they are available and so that your data and content can be migrated. LCvista also offers a number of features and benefits that you will now have the opportunity to utilize.

Will all of my data be migrated?

We have identified the critical data elements that we will programmatically sync to LCvista, including certifications, completion records, jurisdictions, courses, events, activities, sign-in sheets, user accounts, enrollment status, assignments, and custom fields. For any data that cannot be automatically migrated for you, we will ensure you have access to that data and the support resources necessary to help you import and utilize it in LCvista.

Will you be providing training on the new platform? Will that also include end users?

Yes, we will provide a number of training guides, walkthroughs, and videos to ensure a smooth transition. We will also make sure that you have all the resources you need to train your professionals to use LCvista effectively.

Who needs to know?

- Prolaera Administrators:
  - How to use LCvista
  - Time for Set-up
- Firm IT
  - SSO
  - HRIS Feeds
- Prolaera End-Users:
  - Date of Transition
  - Self-study

LCvista Update | **Architecture**

SOC 2 Type 2 Certification | SOC 2 compliance is an important part of LCvista's core values – our commitment to the service of our customers. This achievement demonstrates the steps we are taking to ensure customer data is secure on a continuous basis.

Multi-tenant Architecture | Our migration to a multi-tenant architecture ensures that LCvista's performance, reliability, and support will scale in line with our company's growth initiatives as well as our client's.

Open Q&A

Who should I contact?

- I am currently using the Prolaera product:

  Prolaera Support: support@prolaera.com

- I am currently using the LCvista product:

  LCvista Support: support@lcvista.com

- I am not using either product and am interested in learning more: LCvista Sales: sales@lcvista.com

- For more information: https://support.lcvista.com/knowledge