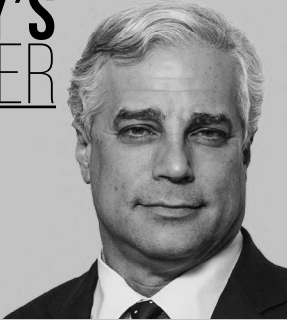


## BARRY'S CORNER



Congrats to Newtek for a great quarter! On behalf of all of Newtek's stakeholders (employees, shareholders, creditors) I wanted to thank each and every one of you for making Newtek a better company through the pandemic. We truly appreciate all of your efforts.

[Click here to read the full Q2 Earnings Press Release](#)

[Click here to listen to the recorded call and view the presentation](#)



## NTS

### New Hires

#### **Andy Schattman** Account Executive

We are thrilled to have Andy Schattman join our Technology Sales Team. Andy has been a Solutions Sales Executive in the IT services industry for over 25 years. Andy is based out of South Salem NY, and with extensive experience in both the MSP and VAR worlds, he has been a leading producer for several organizations.

#### **Tara Shikany** EndPoint Tier 2 Engineer

Tara Shikany joins NTS remotely from Ashland, Kentucky as an EndPoint II Engineer. Tara brings 20+ years of experience in IT and in her short time at NTS has earned the admiration of many of our customers. We are excited to have Tara as part of the NTS family.

#### **Jacob Allen** EndPoint Tier 2 Engineer

Jacob Allen comes to NTS working remotely from Virginia Beach, Virginia as an EndPoint Tier II Engineer. Jacob brings previous MSP experience and has strong technical knowledge. In his short time here, he's jumped in and made an immediate impact with our clients. We are excited to bring Jacob on board and look forward to his continued success here at NTS.

#### **Jon Vital** EndPoint Tier 1 Engineer

Jon Vital is joining us as a Tier I Engineer and the new onsite technician in the Lake Success office. Jon has been hard at work helping support office staff and brings strong technical knowledge to the NTS team. In his short time here, Jon has assisted in long overdue software and hardware upgrades in the Lake Success office. We are excited to bring Jon on board and look forward to his development into a senior technician.

### Who trusts us with their technology needs?

- » One of the world's largest global banks
- » A major US restaurant chain
- » One of the world's largest stock exchanges
- » A high end, global watch brand
- » A local law firm

## NMS

### New Solution - Newtek Billing Manager

Newtek Merchant Solutions is proud to announce its latest billing solution – an award-winning tool that seamlessly connects a Newtek merchant account to QuickBooks, Xero or Accounting Suite!

With **Newtek Billing Manager**, merchants can accept payments, send invoices, and reconcile batch deposits directly in their accounting software saving countless hours of wasted administrative busy work.

**Some features include:**

- » Process credit, debit and ACH payments. Setup autopay and manage recurring billing.
- » Email invoices on merchant branded letterhead and collect payments via hosted payments page
- » Zero Cost Processing made easy by adding line items to invoices for Technology Fees



#### Welcoming Mike Breier

We are thrilled to have Michael Breier join us as Vice President, Independent Sales Organization (“ISO”)/Agent Development. Mr. Breier comes to NMS with over 15 years’ experience in the merchant services industry, with an extensive background in

ISO management, business development and risk management. Most recently, Mr. Breier was Vice President, Business Development at Priority Payment Systems. Prior to Priority Payment Systems, Mr. Breier was Director, Risk Management at Cynergy Data. Earlier in his career, he held portfolio management positions at First Data Corporation.

If you know of a business owner that could benefit from NMS solutions, please submit a referral to [Newtracker](#)  
If you have questions how to do this email [Marketing@newtekone.com](mailto:Marketing@newtekone.com)

## PAYROLL & BENEFITS

### Case Study

Newtek Payroll was contacted by a business owner looking for a better and more affordable option for their payroll processing. He was with ADP at the time and dissatisfied with the customer service he received from them. After a thorough review and consultation, we were able to offer him a payroll solution that was over 15% less expensive than what he was

paying for at ADP. Within a week of signing on with us, his company was completely onboarded - just in time for the first payroll of the new year! Not only did his company get a payroll solution that was customizable to the needs of his business for a better price, he was assigned a dedicated customer service rep to address his needs.



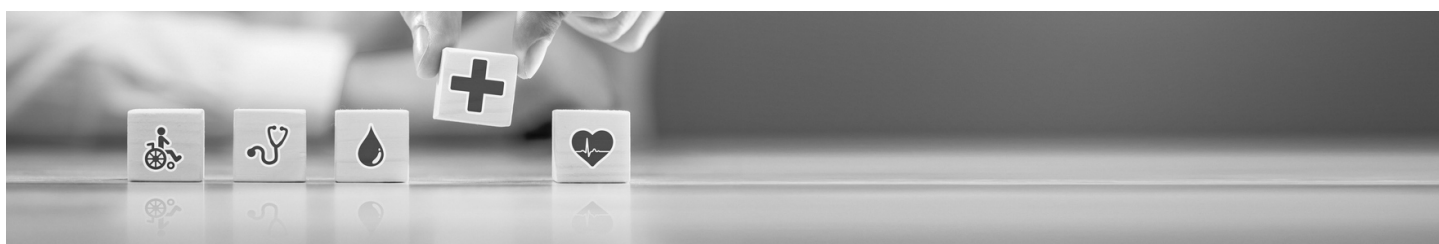
If you know of a business owner that could benefit from Payroll & Benefits solutions, please submit a referral to [Newtracker](#)  
If you have questions how to do this email [Marketing@newtekone.com](mailto:Marketing@newtekone.com)

## NIA

### New Initiatives

Newtek partnered with UBS on a new initiative to offer their clients a platform of insurance product solutions, including Property and Casualty (P&C), through pre-approved Third-Party providers. Newtek has been a business lending partner of UBS for 10 years and is an approved provider for P&C product solutions. P&C insurance is an important part of a client's financial plan and protects their assets from financial loss. Doing a periodic insurance review ensures the clients have the proper coverage to protect their assets and provide for wealth preservation.

Newtek will provide UBS clients a no-cost or obligation review of their insurance coverage including home, auto, business and umbrella. Newtek is licensed in all 50 states and works with more than 40 highly rated insurance carriers. Our strong relationships with these top carriers give us the ability to seek out the best options for your clients.



We have also recently cleared a new personal lines appointment for Vault. Vault writes home and auto coverage in Florida and California.

If you know of a business owner that could benefit from NIA solutions, please submit a referral to [Newtracker](#)  
If you have questions how to do this email [Marketing@newtekone.com](mailto:Marketing@newtekone.com)

## LENDING



Our Lending and Sales teams have been working hard to assist borrowers who received PPP loans through Newtek with the Loan Forgiveness process. With PPP getting further in our rear-view mirror, it's time to look ahead to what business owners needs to grow their business.

As the economy continues to recover and grow, Newtek is ready to step in with the vital funding they need to keep pace. From upgrading equipment, to health and safety measures, to purchasing commercial real estate, our loans ranging from \$5K to \$15M can put a business in the best possible position to not only survive, but thrive.

If you know of a business owner that could benefit from Lending solutions, please submit a referral to [Newtracker](#)  
If you have questions how to do this email [Marketing@newtekone.com](mailto:Marketing@newtekone.com)

## MARKETING

Want to learn more about Newtek Services?  
The Newtek Library on Teams can answer your questions.

Follow the steps below to access:

1. Open Microsoft Teams
2. Click Teams on the left column
3. Click Newtek Library
4. Click Files
5. Marketing material can be accessed for each division by opening the corresponding folder.



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Your Business Solutions Company<sup>™</sup>  
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[www.newtekone.com](http://www.newtekone.com)