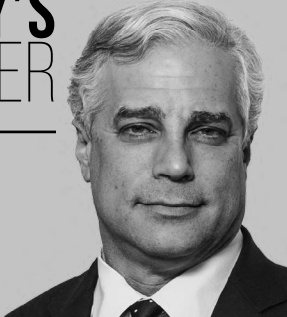


BARRY'S CORNER



Newtek's CEO, Barry Sloane, was recently interviewed by Brad Thomas for the iReit Podcast series. On the podcast Barry spoke about Newtek's history, along with its strategic objectives going forward. Please take some time to listen to this 19 minute podcast.

The podcast is available here

Newtek

Introducing the NewtekOne Dashboard

The One Dashboard For All Your Business Needs

We are thrilled to soon be releasing the NewtekOne Dashboard, a centralized platform where clients can access any and all information about the solutions they have with Newtek. Whether it is loan information, credit card processing information, or website traffic, it will all be easily accessible on the dashboard. We anticipate to launch the dashboard in Q2 or Q3 of 2022.

See below for a sneak peak of how the dashboard will look!

Introducing The NewtekOne Dashboard™ “The One Dashboard for All Your Business Needs”™



The screenshot shows a web browser window with the URL <https://test.newtekreferrals.com>. The dashboard is titled "The NewtekOne Dashboard" and "The one dashboard for all your business needs". It features a dark blue sidebar with navigation links: Overview, Loan Information, Deposit Information, Credit Card Processing Information, Electronic Bill Pay, Newtek Tax & Digital Bookkeeping, Payroll, Health & Benefits Information, Human Resource Tools, Insurance Solutions, Website Traffic Information, Technology Solutions, Monthly Statements, Corporate Document Storage, and Customer Service Contacts. The main content area displays several key metrics:

- Loan Account Balances:** \$1,248,646 (NEXT PAYMENT DUE Dec 1, 2021)
- This Week's Credit & Debit Card Sales:** \$122,452 (7,342 Transactions, ↑ 4% from last week)
- Payroll, Health & Benefits:** \$16,133 (MTD Gross Payroll, NEXT PAYROLL DUE Dec 5, 2021)
- Account Balances:** \$236,070 (Deposit Money)
- Monthly Website Traffic:** 12,300 (↑ 7% from last month)
- Corporate Document Storage:** View All (includes Tax Return, Article of Incorporation, BPP Policy)
- HR Tools:** Employee Handbook, Offer Letters, Code of Ethics
- Insurance:** Property & Casualty, Health & Benefits, Voluntary Benefits

NMS

New Live Webinar Series

Newtek Merchant Solutions is proud to announce its new educational webinar series for clients, ISOs, and partners. These webinars will focus not only on the latest NMS innovations, but keep attendees up to date on industry trends.

Andrew Jadzatz on his hopes/goals for the new webinar series: "We intend these ISO Webinar series to raise overall awareness of NMS as an organization, our collective product suite and with an emphasis on partnership."

The first webinar was held on November 18 and gave ISOs a deep understanding of Newtek Billing Manager and its benefits to their clients.

To access the webinar from the newsletter, please click the button below.

**To Access the Live Webinar
Click Here**



**Intergrated Virtual
Terminnal**



**Send Invoices & Collect
Payments Online**



**Add Technology Fees
to Invoices**



**Automated
Reconciliation**

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

PAYROLL & BENEFITS

New Hires



Ben Campbell: Payroll Tax Manager

Ben works remote from Maricopa, Arizona. He comes to Newtek from Creative Business Resources (AZ) and Vensure. Ben also had 2 Years in the PEO and ASO industries and is an expert in MasterTax. He has been involved with daily business processing for 7 years, along with a heavy skill set with payroll programs such as, HRP, Prism, and Darwin.



Shannon Reese: Customer Service Representative

Shannon Reese is a remote worker in Coldwater, MI. Shannon comes from iSolved as an experienced payroll specialist with 4 years in the payroll industry. The payroll team is very excited to have Shannon join the team and look forward to a successful future together.

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

Newtek Insurance Agency

Collaborative Case Study - NIA, NTS, Payroll & Benefits

Business Industry: Trucking

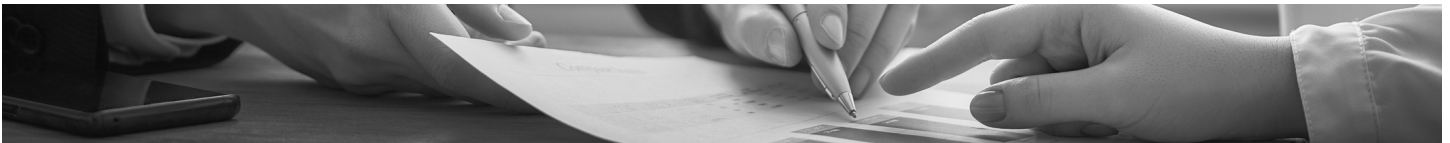
Coverage: Group Medical Plan

When: Effective Date 3/1/2021

Where: Client is located in Pleasanton, TX.

Why: Client came to Newtek because he wanted to work with a one-stop-shop company to handle all of his business needs. Client needed insurance, technology, and payroll and benefit solutions.

Quote from CEO: I wanted to send out an email to the team members that have help me set up the services I need to manage my new small business West Wind Trucking LLC. Starting this company has been a life long dream for me for most of my life. Joshua and his team have made this one of the best experiences for me to realize my dream. I feel like the key to Newtek's success is the simple fact there is real human contact and interaction, and its my hope that Newtek never loses this part of the business. Small businesses need this part of the start up process to actually be successful in today's fast paced world. Small businesses tend to get swallowed up by the corporate machine and Newtek makes me feel like a fortune 500 Company. Final Note, thank you for putting together the group that has helped me get my dream off to a great start.



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

LENDING



After a year focusing on the Paycheck Protection Program, our lending team is shifting their focus back to 504 and 7(a) loans. These loans come with a greater flexibility and can help business owners consolidate and refinance debt, acquire commercial real estate, expand their business, or increase their working capital. The higher lending amounts we can offer with these loans mean businesses can look beyond merely surviving and start planning for growth.

We are proud of the work our team has done during these very challenging times and are excited for the future.

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

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.



"I would like to wish everyone at Newtek a Happy Thanksgiving!"

