



## **Strata Decision Technology, LLC Financial Institutions – Software Referral Program Terms & Conditions**

Last revised October 31, 2025

Strata Decision Technology, LLC (“**Strata**,” or “**we**”) values the partnerships we build with our customers. The Financial Institutions Referral Program (“**Program**”) is designed to recognize Strata customers (“**you**”) who introduce other financial institutions to Strata’s software and services.

By submitting a referral, you acknowledge that you have read, understood, and agree to these Terms & Conditions (“**Terms**”).

**Who can participate:** The Program is open to current Strata customers in the Financial Institutions vertical who are in good standing. Participation is optional and subject to these Terms.

### **How it works:**

- If you refer another financial institution to Strata and that organization completes a qualified demo with our sales team, you’ll receive 0.5 Consulting Day Credits.
- If that same organization signs a new software subscription agreement with Strata within twelve (12) months of your referral, you’ll receive an additional 1.5 Consulting Day Credits.

If you earn credits, Strata will document them separately with your organization. Consulting Day Credits have no cash value, may not be exchanged, transferred, or sold, and may only be applied toward future consulting engagements with Strata.

**How to Submit a Referral:** Fill out this referral form: <https://www.stratadecision.com/financial-institutions-software-referral-program>. The form will ask for:

- The name of the referred organization; and
- The name, title, and email address for a contact at that organization.

By submitting a referral, you confirm that you have notified the referred contact that you are sharing their information with Strata, and the referred contact has agreed to be contacted by Strata for sales follow-up.

If two customers refer the same organization, the first referral received will be eligible. Strata will let you know once your referral has been accepted as qualified. Strata reserves the right, in its discretion, to decide whether to pursue or decline any referral opportunity.

**What counts as a Qualified Referral:** To qualify, the referred organization must:

- Not be a current Strata customer or in an active sales process with Strata;
- Be a U.S. based financial institution or related organization that has an asset size over \$1B (*entities below \$1B in assets may be considered on a case-by-case basis and are subject to approval*); and
- Participate in a scheduled, formal product demo with Strata.



**Program Management:** Strata may:

- Modify, suspend, or terminate this Program or these Terms at any time, including as needed to comply with applicable laws or regulations;
- Limit the number of referrals or Consulting Day Credits awarded; and
- Disqualify any referral that appears fraudulent, misleading, or inconsistent with these Terms.

**Compliance:** By participating, you represent that your participation complies with all applicable laws and internal policies of your organization.

**Relationship of the Parties:** Participation does not create a partnership, agency, or joint venture with Strata. Each party acts independently and is responsible for its own obligations. You may not represent or bind Strata in any way.

**Governing law:** These Terms are governed by the laws of the State of Illinois, without regard to conflict-of-law principles.

**Disclaimer:** Strata is not responsible for any costs or expenses related to your participation in this Program. Participation is voluntary.

**Entire Agreement.** These Terms represent the entire agreement between you and Strata regarding participation in the Program and supersede any prior communications or understandings about the Program. No other agreements, representations, or promises apply unless expressly stated here.

**Updates.** We may update these Terms periodically. The latest version will always be available at [www.stratadecision.com/legal](http://www.stratadecision.com/legal). Continued participation after an update means you accept the revised Terms.

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