From Ed of Ocala **Guidelines and Procedures as of Aug. 7, 2021**

Attention: I will also be providing some additional information, as it becomes available.

 All Docs referred to in **RED** can be found in Docs and Files Room.

PRIOR TO YOUR APPT FOR BOTH EXCHANGES AND REDEMPTIONS

* Plan to dress professionally
* Ensure you are familiar with appointment location
* Plan appropriate measures to ensure timely arrival
* Bring all your currencies and bonds
* Bring calculator -**Blue ink** pen-paper – no phone or laptop
* Remember the first meeting is an exchange meeting – not to be used to determine how to handle your wealth
1. **- Guidelines for Currency ONLY holders, and Part 1 for Bond holders:**

If you have any type of ZIM Bonds, this section is only a part of what you need to know.

**1st Appointment:**

1. Upon your arrival and entry to the exchange center You will identify yourself, **hand in your Background information sheet,** show your Identity and address info (2 of each), be asked to **sign an NDA,** and then be taken to watch a 3-minute video that explains the process to come.
2. You then will be escorted to your appointment meeting. There will be 2 or more people in the meeting with you. A person handling your exchange, a Wealth Manager or Private banker or both. Ask which one will be able to help answer questions if there are any.
3. You will give the person handling the exchange your **Tally sheet** and the corresponding currency. Give them the appropriate **Form for each currency** for them to sign confirming authenticity and exchange amount to be deposited. **(Your edited Form for each of your currencies)** **See the accompanying forms for most currencies. Fill in the blanks.**
4. Give the exchange person a copy of your **Trust documents**, and your **Client information sheet**. Have an extra copy of that paperwork for the Private Banker/Wealth Manager.
5. The exchange person will take each of your currencies, **one country’s currency at a time**. Have them organized **lowest to highest for each country’s currency**. They will be run through a De La Rue machine to count and authenticate them, one country’s currency at a time.
6. You will be told the rate of exchange for each currency. Get each signed **Form** at that time.
7. Some currencies you have may not be ready to exchange and will be held for you until they exchange, at which time they will credit you the amount. They will give you a receipt for each currency in the form of an SKR, a safe keeping receipt. They have those forms.
8. On the currencies that do exchange they will open an account, give you deposit slips, and ask you to sign a rate agreement. **Currency rates are pre-determined**. For funds that are not immediately available on your debit card, access will be the next day. You should check for their signature on the **Form** for each currency that states **the amount you received** in the **exchange** and so that the **funds are clean and of non-criminal origin,** you should ask for Clean and Clear certificates on their Letterhead for any transfers you plan to make shortly. All the currency exchange funds are yours, and available to you in the first day or two.
9. You need to **write down the account information for your new account(s). Get the access info for your account(s)** and **ask if they have a secure laptop for banking use only so you can monitor the accounts and move funds at times**. Wire transfers and Cashier’s checks will be done with your Private Banker/Wealth Manager later at your 2nd appointment.
10. When you are exchanging, they will introduce a Private Banker or one of their Team members. They will help you during the next few days get things taken care of from your **Immediate Needs List**, tell you what Perks and Benefits they offer and more. You will need to meet with them and discuss and sign a short-term agreement (30 to 90 days) with them. They can help you with the transition to this wealthier life.
11. Get everyone’s card that you talk to. Be sure to make a second appointment with WM. Give the WM a copy of your **Immediate Needs List.**
12. Everyone exchanging/redeeming will have orientation classes for themselves offered by the Private Bank, and then for your family later. This is the Transition orientation that well help you understand the new opportunities for you and your family and how things can be done.

**Additional Guidelines for ZIM (any Bonds) holders ONLY:**

This includes those with Zim only, as well as those with other Bonds, and those with both Zim, or other Bonds, who also have currency.

Remember, the Zim is almost all for projects. You will get your share at redemption, but the project uniqueness determines if you get more for the projects, and possibly for yourself.

NO ONE is getting outrageously wealthy on Zim. Some will be wealthy. Some even more wealthy, but not as wealthy as those that bought trunk loads full planned.

There is a starting amount per 100T Zim note, but not a “rate” like you think of with currencies. With currencies the rate you get is the same for all the notes you have at that rate.

Zim is not “rate” based. It will start out at an amount that will be used as a starting value.

Whether you have a lot of Zim, or a little the starting point is the same per 100T note, or the equivalent. It will not be starting lower than the walk away amount.

The starting point is a value for each of the first 2 100T Zim notes or equivalent. The amount per 100T note will decrease until it reaches a certain number and then it will be a constant amount no matter how many more you have.

This method is only for the portion you get personally, and your debit card will have 1 or 2 percent of the total on it for the first 9 days, and then an additional 8 or 9 percent will be added to the balance on the card. The remaining 90% will be earning interest and paid out with the interest earned in a structured pay out for, as of yet, undetermined period of years. These amounts are all your personal part of the Zim redemption. So, you will have a continuous flow of funds coming your way for many years.

The projects are to be presented before leaving the redemption center in a brief overview that will give your Wealth Management team (that you will sign an agreement with) an idea of your projects’ uniqueness and viability.

At the 2nd meeting, with your Team, they will prepare everything needed in order for your projects to be presented, and they will negotiate the funding for the entire project(s). Projects are to be for 25 to 50 years, with renewal being an option. This part is a huge undertaking and will take some time considering all the others doing projects like you want to do.

Inside of the final organizational plans for your projects there will be areas of personal benefit to you based on what your projects entail. That means your idea and continued input will earn additional compensation for you and your family. You may be a part of the Project hierarchy, but unless you are a qualified and approved Project Manager you will not “run” everything.

The previous option of supporting a project from a list is no longer a separate part of the plan. Everyone with Zim will automatically contribute, at the redemption, a flat percentage that will automatically fund those plans, even if they are not presenting a project(s) of their own.

Your belief in your project, your desire to help get it implemented, and its uniqueness will determine its final approval. Those final plans will be audited and get final approval by the DoD experts in planning, financing, logistics and viability.

If you project is approved, it will get whatever funding it needs to get it done.