



WAIMI.xyz Advisory Board Member Questionnaire

The questionnaire is structured into thematic blocks: Expertise and Background, Role and Commitment, Technical and IP Understanding, Governance and Strategy, and Integration with the Tony-Wolf Ecosystem.

Full 50-Question Questionnaire

1. What is your primary area of expertise (e.g., AI/ML, business strategy, legal compliance, fundraising, product design)?

I have strong capabilities in business strategy, product design, legal and regulatory topics (in certain niche markets), and fundraising, so I can assist across a wide range of professional areas depending on your needs.

2. How many years of experience do you have in artificial intelligence and machine Learning?

I have 10 years of experience applying AI and machine learning concepts strategically using analytics, automation, and data insights to guide operational decisions and improve performance. I work closely with data teams and leverage AI-powered tools to optimize workflows and outcomes.

3. Have you previously advised early-stage startups? If so, in what capacity (technical, strategic, financial)?

Yes, both strategic and financial.

4. Are you familiar with the legal and regulatory environment for startups in Florida?

I have an understanding of the startup regulatory landscape in Florida, including requirements for business registration, tax compliance, and employment laws. I also know how to navigate state and local resources to ensure businesses stay compliant.



WAIMI.xyz Advisory Board Member Questionnaire

I'm proactive about consulting legal and compliance experts when needed to ensure all obligations are met. I still hold an active real estate license in the State of Florida.

5. What is your understanding of the Florida Uniform Trade Secrets Act (FUTSA) and its implications for AI companies?

I see FUTSA as both a protective and preventive tool. By clearly defining what constitutes a trade secret, AI companies can structure their data governance, confidentiality agreements, and IP strategies more effectively. This helps reduce legal risk, protect innovation, and strengthen investor confidence.

6. How would you evaluate the sensitivity of proprietary AI models and training datasets held by WAIMI?

Since this is not my strongest point, I would start by recognizing that proprietary AI models and training datasets are among the most valuable assets an AI company holds. Evaluating their sensitivity is not just about technical classification, it is about understanding the competitive, legal, and operational.

7. What experience do you have with neural network architectures and model confidentiality?

From an operational standpoint, I have led initiatives to safeguard confidentiality through structured access controls, NDA enforcement, secure storage environments, and compliance with trade secret protections.

8. Have you reviewed or drafted NDAs for technology or AI-driven companies before?
Reviewed.

Never drafted, only reviewed.



WAIMI.xyz Advisory Board Member Questionnaire

9. How do you assess the risk of intellectual property (IP) leakage in collaborative AI development?

The risk of IP leakage in a collaborative AI development, I focus on controlling access, securing collaboration channels, enforcing legal protections, and addressing human risk. I start by identifying where sensitive IP is stored and ensuring only essential personnel have access (gate keepers). I then look at how information is shared, making sure it happens in secure, encrypted environments. I also rely on strong contracts, NDAs, and clear data use agreements to set expectations and define ownership.

Finally, I consider human factors by providing training, monitoring activity, and building a strong culture of accountability. This combined approach helps minimize the risk of IP leakage and protects valuable assets.

10. What role do you expect to perform on WAIMI's advisory board (e.g., strategic guidance, technical review, legal compliance, fundraising)?

I enter into this joint venture with humility and gratitude. I will happily serve wherever I am needed and what positions I can best support.

11. How many hours per month can you realistically dedicate to advisory duties?

I do not believe in setting a limit or timecap, I will work until my job or current task is accomplished. A team is only as strong as their weakest link.

12. Are you currently advising any other AI or business planning platforms that could be considered competitors?

No



WAIMI.xyz Advisory Board Member Questionnaire

13. Do you have any conflicts of interest with Tony Wolf or any entities within the "Tony-Wolf Ecosystem" (e.g., CoachWolf.services, AProcessRedesigned.com)?

No

14. What is your experience in data privacy, particularly regarding client behavioral analytics and proprietary inputs?

My experience in data privacy is grounded in managing sensitive patient and operational data within highly regulated healthcare environments. I have led initiatives ensuring strict adherence to HIPAA and compliance standards while integrating proprietary inputs and behavioral analytics into secure workflows. With a strong financial and compliance background, I have built and overseen systems that protect confidential information, maintain regulatory alignment, and support accurate reporting and strategic decision making without compromising data integrity.

15. How would you recommend structuring governance and decision-making for a startup of WAIMI's size (2–10 employees)?

For a startup of WAIMI's size, I would recommend a lean and agile governance structure that keeps decision-making clear, fast, and accountable. At this stage, a flat structure works best, centered on a core leadership team with clearly defined roles and decision capabilities. Strategic decisions should rest with the founders or executive leads, while operational decisions can be delegated to functional leads to maintain speed. I would also establish a lightweight framework for documenting key decisions, setting measurable goals, and scheduling regular alignment meetings to ensure transparency and accountability without overcomplicating the process. This approach keeps the company nimble while creating the discipline needed for scalable growth. Bottomline is lean and streamlined until cash flow positive, while maintaining a quick response time.



WAIMI.xyz Advisory Board Member Questionnaire

16. What key performance indicators (KPIs) would you track to measure the success of the advisory board?

To measure the success of the advisory board, I would focus on KPIs that reflect strategic impact rather than just activity. This includes tracking measurable contributions to business growth initiatives, partnerships, or raising capital (if needed), as well as the percentage of advisory recommendations implemented and their outcomes. I would evaluate the quality and quantity of strategic introductions or partnerships generated through the board, along with member engagement levels such as attendance, participation, and responsiveness. Additionally, I would monitor Net Promoter Score to gauge customer satisfaction as a trickle-down effect of the board's strategic influence and decision making. Finally, assessing the ROI of advisory input by linking their guidance to tangible improvements in operational efficiency, revenue growth, and market positioning, ensuring the board's impact is both measurable and meaningful.

17. How do you prefer to receive updates and reports (e.g., monthly emails, quarterly meetings, dashboards)?

I feel that updates should be received via a dashboard in real-time. A lag in communication could expose potential weakness that could be immediately corrected. As far as emails, at a minimum there should be weekly updates while in the start up phase.

18. What is your stance on open-source versus proprietary AI development, particularly in a commercial context?

Open-source accelerates innovation, reduces costs, and builds community trust through transparency on a PUBLIC platform. However, in a commercial context, proprietary development offers stronger control over intellectual property, competitive differentiation, and data security. My preferred approach is a hybrid model, leveraging open-source for gathering necessary data but not pumping your proprietary information through it. The more data you feed open-source the algorithm is memorizing it and now is public



WAIMI.xyz Advisory Board Member Questionnaire

content. Carefully leveraging the systems can balance innovation with strategic protection of competitive advantages and compliance obligations. I am skeptical that any public platform is not necessarily the correct tool.

19. How would you prioritize feature development for WAIMI's core AI-powered business planning platform?

I would prioritize feature development for WAIMI's AI-powered business planning platform by focusing first on functionality that drives the greatest strategic and operational value for early users. My approach would begin with establishing strong, reliable core features that ensure data accuracy, security, and ease of use. From there, I would prioritize features based on three main factors: customer impact, scalability, and ROI potential.

20. What experience do you have with financial forecasting models in AI-based Systems?

I have extensive experience working with financial forecasting models, particularly in building and analyzing projections that support strategic growth, operational efficiency, and investment decisions. My background combines financial modeling with data driven decision making, which aligns naturally with AI-based forecasting systems. I have led initiatives that used predictive analytics to project revenue, operating costs, and cash flow under multiple scenarios, integrating both structured and behavioral data inputs. My focus is on leveraging AI to enhance forecasting accuracy, identify trends early, and support leadership with actionable insights that inform scalable business strategies.

21. How would you validate the accuracy and reliability of AI-generated business plans and reports?

I would approach validating AI-generated business plans and reports the same way I would test a financial strategy before taking it to the board, by putting it through



WAIMI.xyz Advisory Board Member Questionnaire

real-world pressure. First, I ground the outputs in hard data, reconciling every major projection with verified financials, operational performance metrics, and historical trends to spot any gaps or exaggeration. Next, I would pressure test the AI's assumptions by running different market scenarios and sensitivity models to see how they hold up under change. I also bring in key team members, gaining different perspectives to challenge the logic, uncover blind spots, and catch any bias the model may miss. Finally, create a feedback loop that compares forecasts to actual results, using those differences to fine tune and strengthen the model over time. This way, I am not just trusting AI blindly. It is essential to make sure its insights are tested, accountable, and built to perform in the real world.

22. What customer acquisition channels do you consider most effective for a B2B AI tools like WAIMI?

For a B2B AI tool like WAIMI, (offering solutions to small companies), I would focus on high impact channels that build trust, demonstrate value quickly, and target decision makers directly. Strategic partnerships and industry alliances are top priority because they accelerate credibility and open doors to qualified leads. Also leverage thought leadership, webinars, white papers, and targeted LinkedIn campaigns to position the product as a trusted solution, not just another tool. Account based marketing and personalized outreach are critical for engaging high-value clients, while product demos and free trials can convert interest into adoption by showcasing ROI upfront. Lastly, use referral programs (such as a UF Entrepreneurial program joint venture) and customer advocacy to create organic momentum because in B2B, a trusted recommendation often beats any ad spend. Word of mouth tends to convert 5 to 8% more clients than any ad spend.

23. How would you assess the current market fit of WAIMI's AI planning services?

WAIMI's strength lies in its clearly defined value proposition, delivering AI-driven business planning, market analysis, operational strategy, and financial forecasting in one platform. It directly addresses a major pain point faced by small and growing



WAIMI.xyz Advisory Board Member Questionnaire

companies that often lack the resources to build robust business plans, accurate forecasts, and dynamic scenario models. WAIMI also offers a clear starting point for individuals and teams who feel lost on where to begin, simplifying and streamlining a traditionally complex process. This makes the tool highly relevant to individual entrepreneurs seeking smarter, faster, and more cost effective planning solutions. Adding to this, WAIMI has established early credibility through its mission to “democratize access to business planning tools using AI,” a message that resonates strongly with mid-market and enterprise audiences looking for innovative yet practical solutions.

24. What strategic partnerships would you suggest to expand WAIMI’s reach or enhance credibility?

Partnering with the U.S. Small Business Administration (SBA) would be one of the strongest strategic moves WAIMI could make. The SBA has direct access to millions of small business owners who are actively seeking funding, support, and strategic guidance. This is the exact audience WAIMI is designed to serve entrepreneurs who need clear, structured business plans and reliable financial forecasts but don’t always have the expertise or resources to build them.

The SBA guarantees billions of dollars in loans each year and supports over 2 million entrepreneurs through its advisory network. By aligning with them, WAIMI could become a trusted planning tool for businesses preparing loan applications, grant proposals, and strategic roadmaps. The partnership would offer not just visibility, but also instant credibility, because the SBA is one of the most trusted names in the small business ecosystem.

Through local development centers, mentorship programs, and workshops, WAIMI could be integrated into training and advisory resources, helping business owners create funding ready plans more efficiently. This is a direct path to scale, meeting entrepreneurs where they already seek help and positioning WAIMI as a solution that



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removes complexity and accelerates growth. This kind of partnership isn't just a marketing play; it is a credibility anchor and a growth engine.

25. How do you evaluate the credibility of an AI startup with no formal legal web pages (Privacy Policy, Terms of Service, About Us)?

When evaluating an AI startup without legal pages like a Privacy Policy or Terms of Service, I treat it as an early warning sign and dig deeper into its foundation. I look at the leadership team's credibility, their track record, and whether the product is clearly explained and technically sound. I check for external validation, investors, partnerships, or accelerator programs which can signal legitimacy even at an early stage. I also assess how prepared they are to address compliance and governance questions. If they cannot provide clear answers or a plan to formalize their structure, it's a strong indicator they're not ready for serious business engagement.

26. What immediate steps would you recommend to formalize WAIMI's legal and compliance infrastructure?

To formalize WAIMI's legal and compliance infrastructure quickly and strategically, I'd focus on building a solid foundation without overextending resources in the early stage.

First, I would establish core legal documentation; Privacy Policy, Terms of Service, and a clear Data Usage Policy. These are not just legal formalities; they're critical trust signals for customers, partners, and investors. They should clearly define data handling practices, liability protections, and user rights to demonstrate accountability from day one.

Second, I'd set up a lightweight but effective compliance framework that aligns with key regulations like GDPR and CCPA. This includes outlining data retention policies, consent protocols, and security standards, which are especially important for an AI platform handling sensitive business information.



WAIMI.xyz Advisory Board Member Questionnaire

Third, instead of immediately hiring a full legal team, I would bring someone onto the board with legal or regulatory expertise to oversee compliance and governance. This allows the company to conserve cash in the startup phase while still ensuring structured oversight and credibility with partners and investors.

Finally, I would work with that trusted board member as a legal or compliance advisor to review existing practices and create a scalable roadmap as the company grows. This approach builds a strong legal backbone early on, positions WAIMI as a credible and trustworthy platform, and sets it up for smooth scaling without unnecessary upfront costs.

27. How important is having a professionally drafted Privacy Policy and Terms of Service for user trust and investor confidence?

Having a professionally drafted Privacy Policy and Terms of Service is extremely important because these documents signal legitimacy, accountability, and operational maturity to both users and investors. It is also an indicator of trust.

For users, these policies clearly explain how their data is collected, stored, and protected. In an AI company, where data is often sensitive and forms the backbone of the product, transparency around usage builds trust and reduces hesitation to adopt the platform. In fact, studies show users are significantly more likely to engage with platforms that have clear, accessible legal policies in place.

For investors, these documents are a basic due diligence checkpoint. A lack of formal legal structure is often seen as a red flag, signaling potential regulatory and reputational risk. Professionally drafted policies demonstrate that the company understands its legal obligations, takes compliance seriously, and is structurally prepared to scale. It is also a presentation of a polished branded company with a reputation of reliability.



WAIMI.xyz Advisory Board Member Questionnaire

28. How would you structure an exit strategy or seed funding round for a company like WAIMI?

For a company like WAIMI, I would structure the exit strategy and seed funding round in a way that builds long term value while keeping flexibility for future growth or acquisition.

For seed funding, I would focus on raising enough capital to fund 12–18 months of aggressive product development, legal infrastructure, and customer acquisition. This typically means targeting investors who understand early stage AI and SaaS platform models; angel investors, early-stage venture capital, or accelerator programs. Rather than just raising for runway, I would structure the round around clear milestones: user acquisition targets, ARR growth, strategic partnerships, and key compliance achievements. That makes the company more attractive for the next funding stage. A simple structure like a SAFE or convertible note can reduce legal complexity and preserve equity flexibility.

For an exit strategy, I would design a dual-path approach. On one hand, I would build toward sustainable growth with recurring revenue and strategic partnerships, making the company appealing for acquisition by larger AI, SaaS, or fintech players. On the other hand, I would ensure the business can stand on its own if a strategic sale isn't immediate, positioning it for a strong Series A or even a later IPO if the market allows. Keeping your options open to a reverse merger as well. Many large tech companies would seize the opportunity to roll up this platform enhancing their vast consumer offerings.

Key to this is making WAIMI's value proposition defensible: TRADE SECRETS, strong IP, a loyal user base, strategic data assets, and clear differentiation in the AI planning space. By keeping the funding structure clean and the growth milestones measurable, the company can attract smart capital early and negotiate stronger terms down the line either for acquisition or continued expansion.



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29. What is your professional network like within the Florida tech startup ecosystem?

My professional network within the Florida tech startup ecosystem is well-established and built through hands-on involvement rather than just surface level connections. I have developed strong relationships with founders, early stage investors, and accelerator programs. My ties through University of Florida have also connected me to a growing number of tech-forward startups and innovation initiatives, especially those focused on AI, SaaS, and energy solutions. I have worked with several start ups in Florida, helping them scale and eventually taking them public.

I stay closely engaged with people who are actually building and scaling companies, founders, operators, and investors who are active in the ecosystem. These relationships give me direct access to opportunities, potential partnerships, and funding conversations. It is a network years in the making built on trust, collaboration, and shared growth, which is especially valuable for launching and scaling early stage ventures like WAIMI.

30. How would you rate WAIMI's current competitive advantage in the AI-powered business planning space?

I would rate WAIMI's current competitive advantage as emerging with promise, with real potential to stand out if it sharpens its positioning and deepens its differentiation. The strength lies in the fact that WAIMI is tackling a very real pain point: most small and mid-sized businesses don't have the time, tools, or expertise to build strategic business plans and accurate forecasts. AI-powered planning can solve this problem faster and more affordably than traditional consulting or manual modeling. Think about the mom and pop companies, IPOs, Micro-cap companies, who are starved for funding with lack of resources. Here is the solution in a simple "click and go" platform.

Right now, the competitive edge comes from accessibility and simplicity. Simplicity is gold in this complex world we live in, keeping it fundamental so that even a simple pastry shop owner can utilize the services. Not all mom and pop companies will grow, franchise, go public, or scale but they are all unified in needing WAIMI's services.



WAIMI.xyz Advisory Board Member Questionnaire

While larger platforms often target enterprise clients with complex and expensive solutions, WAIMI can position itself as a user-friendly, affordable, and intelligent planning tool for founders and operators who need quick, clear insights. That alone sets it apart in a space crowded with high-cost, high-friction solutions.

However, to make that advantage sustainable, WAIMI will need to focus on areas competitors can't easily replicate, BE A MASTER OF YOUR CRAFT, such as proprietary forecasting models, intelligent scenario planning, strong integrations with popular business tools, and a trusted compliance framework. If those pieces are executed well, WAIMI's competitive advantage could grow from being an early mover in accessibility to becoming a category leader in AI-driven strategic planning for ALL market segments.

31. What risks do you see in WAIMI's reliance on proprietary training datasets and Models?

TRADE SECRETS, ALL OF THE TIME AT EVERY STAGE! Never give data without an airtight contract, no matter who it is.

The biggest risks in WAIMI's reliance on proprietary training datasets and models fall into four main areas: data quality, scalability, compliance, and competitive vulnerability.

First, if the proprietary data isn't broad, diverse, or updated frequently, the models risk becoming biased or producing unreliable outputs. This can directly undermine the platform's credibility and limit its usefulness across industries.

Second, scaling becomes more complex when a company is overly dependent on proprietary data. Unlike open-source or federated models, proprietary training requires continuous investment in data collection, cleaning, and infrastructure to maintain accuracy. That can strain resources, especially in the startup phase.



WAIMI.xyz Advisory Board Member Questionnaire

Third, there are compliance and legal exposure risks. If WAIMI's datasets involve sensitive or third-party business information, the company must have airtight privacy agreements, usage rights, and security measures in place. Any mishandling could lead to serious reputational and regulatory consequences, especially under frameworks like GDPR and CCPA.

Lastly, competitors with access to broader open-source datasets or strategic data partnerships may outpace WAIMI's model development if the company does not keep innovating. Proprietary models can be a strength, but if not managed strategically, they can also become a bottleneck. The key is balancing the competitive edge of proprietary data with flexibility, compliance, and continuous improvement.

Your KPIs can help here!!!

32. How would you ensure compliance with data protection and privacy regulations (e.g., GDPR, CCPA, future state laws)?

100% Compliance and Regulations

I would FIRST ensure compliance with data protection and privacy regulations like GDPR, CCPA, and future state laws by building privacy and governance into the foundation of WAIMI's operations.

The first step would be to establish clear, transparent data collection and usage policies that define exactly what data is collected, why it's collected, and how it's protected (Same as HIPAA Laws). This includes publishing a strong Privacy Policy and Terms of Service, along with consent mechanisms that align with regulatory standards. Making this protocol that every client and investor obtains a copy.

Next, I would implement strong internal controls around data handling. That means strict access management, encryption, regular security audits, and clear retention and deletion policies. These practices reduce exposure and build trust with users and regulators. Also, proper disposal and recycling of old technical equipment.



WAIMI.xyz Advisory Board Member Questionnaire

It is also imperative to designate a compliance (HR) lead, either internally or through the board, to oversee ongoing regulatory changes and ensure WAIMI stays ahead of new laws. This avoids the risk of last-minute scrambling when state level privacy laws or federal regulations evolve.

Finally, creation of a transparent user rights process so customers can easily access, correct, or delete their data. This isn't just about checking legal boxes; it builds trust and shows users that WAIMI respects their control over their information. In a space where data is the core asset, strong privacy governance is both a legal requirement and a strategic advantage. Leverage that to the company's advantage as an industry leader.

33. What operational or structural red flags do you see in WAIMI's current public presence or business model?

THERE ARE NO RED FLAGS----- Just normal start up evolution.

The most immediate operational and structural red flags in WAIMI's current public presence and business model point to credibility gaps, early stage infrastructure weaknesses, and potential regulatory exposure. However, this is to be expected since you have no true legal framework and are establishing a board with set responsibilities. You are tackling this in a correct methodical manner and will execute the missing items in proper time.

34. How would you improve WAIMI's integration with existing entrepreneurial or Financial workflows?

I would improve WAIMI's integration with existing entrepreneurial and financial workflows by making it fit seamlessly into the tools and processes that founders, operators, and finance teams already rely on, rather than expecting them to change their habits to use the platform.



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The first step would be to build direct integrations with widely used CRM, accounting, and financial platforms like QuickBooks, Xero, HubSpot, and Salesforce. Most entrepreneurs and small business owners already use these systems to manage revenue, operations, and forecasting. Have these companies come to you, where you can pull in live financial and sales data, WAIMI could automatically generate strategic plans, cash flow projections, and growth scenarios, reducing manual work and increasing accuracy.

Next, focus on workflow automation and API flexibility so users can trigger WAIMI insights from within their existing systems. For example, a business owner could create a new forecast directly from their accounting dashboard or sync AI-generated plans with their fundraising data room. Integrated properly a business owner could strategize their next marketing venture based off of the collected data.

Another important step would be embedding WAIMI into startup support ecosystems like accelerators, incubators, and SBA programs, making it a natural part of early-stage business planning instead of an extra task. Easy is key!

Lastly, develop clear data export and collaboration features that make it easy for users to share forecasts, planning documents, and investor decks with advisors, lenders, or board members. By turning WAIMI into a plug-in rather than a replacement for existing workflows, it would become an indispensable part of the business planning process. Make it a one stop shop, where all small business needs converge into one easy to access platform.

35. What experience do you have with API design, security, and third-party platform Integration?

Personally, I do not know a ton but remember I have an IT team to fall on right now for this but can function at base level:



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I have experience working with API design and third-party platform integration, particularly in environments where security and compliance are critical. My background involves collaborating with technical teams to design API structures that allow platforms to communicate seamlessly without compromising data integrity. I've worked with secure data pipelines that integrate financial, operational, and customer systems, ensuring that information flows accurately while maintaining strong access controls and encryption protocols.

I'm also experienced in identifying which third-party integrations drive the most business value. This includes connecting CRM, ERP, and financial tools to automate workflows, reduce manual data entry, and improve forecasting accuracy. On the security side, I prioritize authentication standards like OAuth 2.0, tokenization, and role-based access, which help protect sensitive data and maintain regulatory compliance. My focus is always on balancing usability with strong security, ensuring that integrations not only work smoothly but also meet the standards expected by enterprise clients and investors.

36. How would you rate the importance of brand consistency across WAIMI,

CoachWolf.services, and AProcessRedesigned.com?

Critical! Your Brand is your reputation that transcends all sectors! Integrity, ethics, and morality, pay endless dividends.

37. What metrics define a successful advisory engagement for you personally?

For me, a successful advisory engagement is defined by measurable impact and alignment with strong values. I look at whether my guidance helps the company hit key milestones, secure funding, or scale strategically. I value strong execution follow through and improvements in growth metrics like customer acquisition, product adoption, and operational efficiency. Just as important, I prioritize company culture, shared values, and ethical leadership because sustainable growth depends on a strong



WAIMI.xyz Advisory Board Member Questionnaire

foundation. I am very passionate about driving results that balance performance, integrity, and long term resilience.

38. How do you prefer to be compensated (e.g., equity, cash retainer, hybrid)?

This is a question for a different day. I love the passion and belief in a solid start up company. I value the fulfillment of seeing a company taking shape and form. Let's work together, make it grow, let's create an unreplicable culture, and the rest will naturally and organically fall into place.

39. What is your track record with startup advisory roles, particularly those leading to funding or exit events?

I co-owned WallStreet Resources (Investor Relations) for years with my ex-husband. I am still a registered Business Broker in the State of Florida. I functioned as a buyers agents for small to micro cap companies who wanted to acquire private businesses. I would scrub the financials, assist in the purchase, and the reverse merger.

40. How would you handle a breach of confidentiality involving AI model weights or training data?

How perfect as October is Cyber Awareness month
LOCK DOWN....Then....

If there were a breach of confidentiality involving AI model weights or training data, my first priority would be to respond with speed, structure, and transparency.

The immediate step would be to contain and assess the breach, identifying what was accessed, how it happened, and whether the exposure involved sensitive or regulated data. This includes locking down systems, revoking compromised credentials, and conducting a forensic review with the security team or external experts.



WAIMI.xyz Advisory Board Member Questionnaire

Next, I'd activate a clear incident response plan, notifying legal, compliance, and any affected stakeholders as required by law or contract. For regulated data, follow all disclosure obligations under frameworks like GDPR and CCPA to minimize legal and reputational risk.

Then focus on risk mitigation and trust repair. That may involve rotating keys, retraining or securing models, updating security protocols, and if necessary rebuilding parts of the system to prevent future breaches. Communication would be transparent but controlled, demonstrating accountability and reinforcing trust with partners, users, and investors.

Finally, I'd strengthen long-term governance, including stricter access controls, regular security audits, data encryption, and updated incident playbooks. Breaches are serious, but how a company responds often matters just as much as the breach itself. A swift, structured, and accountable response can turn a crisis into an opportunity to reinforce trust and resilience. Staff training with scams and how to spot them are critical to keep fresh on the brain. Random internal email audits/test tracking pass, fail rates is critical in this industry.

41. What level of due diligence would you expect before officially joining the advisory Board?

I would hope for a full sit down disclosure meeting so I can fully understand every aspect of the business. This is coming from the perspective of "how can I fully support you and your vision". Full transparency.

42. How do you differentiate between strategic advisory and operational involvement?

Proactive vs reactive.....very simple. One is to proactively forecast and plan and the other is to react and implement.



WAIMI.xyz Advisory Board Member Questionnaire

43. What experience do you have with digital transformation consulting in SMB or enterprise contexts?

Yes, my experience aligns well with digital transformation consulting, even though my background is rooted in operational leadership rather than a formal consulting title. I have led multiple technology driven initiatives in SMB and multi-site healthcare settings, including system integrations, CRM and RCM platform implementations, and automated reporting dashboards that streamlined workflows and improved financial visibility.

I've guided teams through major operational shifts, aligning technology adoption with business goals, improving efficiency, and driving measurable ROI. In many ways, this mirrors the work of a digital transformation consultant, identifying gaps, implementing scalable solutions, and ensuring smooth adoption across teams. My approach is hands-on and results-driven, with a strong focus on creating sustainable operational change.

44. How would you rate the importance of domain name registration transparency for a Tech startup?

I rate domain name registration transparency as very important for a tech startup because it directly impacts trust, credibility, and legal protection. When ownership is clear and properly registered to the company, not an individual or a third party, it signals professionalism and stability to investors, partners, and customers. It fosters credibility and believability.

45. What would you prioritize in the next 6 months: product development, fundraising, or user growth?

For the next six months, prioritize user growth first, supported by focused product development and strategic fundraising.



WAIMI.xyz Advisory Board Member Questionnaire

Early traction and adoption is one of the strongest signals to investors and a powerful way to shape product direction. By getting real users onto the platform early, WAIMI can validate its value proposition, gather actionable feedback, and refine core features based on actual market demand, not assumptions. That kind of evidence builds both credibility and leverage for future fundraising.

Product development would run in parallel, but with a lean, targeted approach, prioritizing features that directly enhance user experience, drive retention, and strengthen the platform's competitive edge.

Once there's clear traction and a sharper product-market fit, fundraising becomes more strategic. Instead of raising capital out of necessity, WAIMI can raise on stronger terms, backed by proof of market demand. This order; 1. user growth, 2. smart product iteration, 3. then fundraising, maximizes both credibility and valuation potential.

46. How would you advise WAIMI on trademark and broader IP protection strategy?

WAIMI to secure its IP early through a layered strategy. First, file trademarks with the United States Patent and Trademark Office for the company name, logo, and key branding to protect against infringement. Then, protect core assets, like algorithms, training data, and forecasting models, through a mix of trade secrets, copyrights, and patents where applicable.

Then ensure all IP created by employees or contractors is legally assigned to the company to avoid future ownership issues. Finally, set up regular monitoring for potential infringements. This approach builds legal protection, strengthens investor confidence, and safeguards WAIMI's long-term competitive edge.



WAIMI.xyz Advisory Board Member Questionnaire

47. What is your view on AI ethics in the context of business planning and strategy Generation?

I love it. My personal philosophy is human, AI, then human. AI should never replace critical thinking, it should expand it. I see AI as a tool that helps people think more creatively, challenge assumptions, and uncover insights they might not reach on their own. But with that power comes responsibility. Ethical AI in business planning means ensuring transparency in how models are used, protecting sensitive data, and always keeping human judgment at the center of strategic decisions. AI can elevate strategy, but people must remain accountable for the outcomes.

48. How would you ensure transparency and trust with users without exposing proprietary AI methods?

Ensuring transparency and trust by clearly explaining what the AI does, how data is used, and what safeguards are in place, without revealing proprietary methods. Users don't need the code; they need clarity, accountability, and control. Showing how outputs are generated, protecting data with strong governance, and communicating openly builds trust while keeping WAIMI's competitive edge secure.

49. What is your availability for onboarding and initial engagement within the next 30 days?

Wide Open :-)