

TapRootCap.com

Website Proposal - October 1st, 2025

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Background

Tap Root Capital (Client) is a private equity firm that partners with both emerging and established fund managers to launch, scale, and strengthen investment platforms. With over 50 years of collective experience, the team provides cornerstone commitments, operational capital, and strategic guidance to help GPs build differentiated strategies. The client is looking to WebSight Design (WSD) to help them create a new website supported by ongoing digital marketing services to help enhance their online footprint.

Objectives

Major priorities include:

- A modern, professional, mobile-friendly design
- An easy-to-use Content Management System (CMS)
- Baseline Search Engine Optimization
- Foundational Online Brand Audit and Planning for ongoing digital marketing engagement

Strategy & Planning

Information Architecture

One of the most important components of successfully implementing a new web site is establishing the “sitemap” prior to initiating design and programming. Organizing content into a defined hierarchy expedites the design process and ultimately results in the best user experience. It also saves development resources and expedites project scheduling. This is an initial rough sketch of a potential site map.

We look forward to any input you have on site structure and a detailed review on scope.

HOME PAGE				
About	Approach	Companies	News	Contact
Our Story	Overview	Overview	Blog	Info
Strategy	Philosophy	Industries	Featured	Form
Team		Featured	List	Map
Testimonials		List	Detail	
		Detail		
	Privacy	Accessibility	RI Policy	

Should this navigation differ significantly then a change order may apply for larger scope.

Web Design

Once the Strategy & Planning phase is complete, WSD will begin the design process, in collaboration with Client. Three (3) Home Page design rounds are included in our estimate. Round One includes two (2) initial mockups. After Client's review and feedback, WSD will present the second round of one (1) mockup. From that, the final approved design will be iterated. Once the Home Page design is completed, WSD will design the templates for subpage usage. The subpage design process should proceed more quickly as it follows the Home Page design themes.

Production

During the initial production phase, WSD will convert the approved design(s) into a clickable website. WSD will program the presentation layer (or, "front end") in HTML, CSS and JavaScript. At the end of the initial production phase, WSD will present Shell Site, version 1.

Mobile Optimization

WSD provides responsive web design services. This means Client's site will be optimized for mobility, via a front-end CSS (Cascading Style Sheets) layer that adapts to the individual aspect ratio of the device used to view the site ensuring optimal presentation for any device be it desktop, laptop, tablet, or phone.

Programming

Platform Overview

WSD will program the website's backend/administrative functions using "LAMP" stack (Linux, Apache Server, MySQL, PHP) code architecture. All code will be open-source, scalable, portable, and the sole property of Client.

The following elements will be programmed and developed in the new site:

- Content Management System (CMS)
- Page Manager
- Team Manager
- Testimonial Manager
- Companies Manager
- Blog / News Module
- Contact Form

Project Management

It is critical that project development stays on budget, and on schedule. As part of that effort, a dedicated technical project manager from WSD will monitor the process and collaborate with Client from project inception to launch.

Quality Assurance

Quality Assurance ("QA") is the safety net of web development. Clients must be aware that they need to reserve a significant amount of time and staff resources to vet and verify their site features. WSD will thoroughly test all work on recent mobile OS and browser combinations. Mobile support for devices and operating systems older than 3 years is not included. Compatibility with Internet Explorer is excluded.

Search Engine Optimization (SEO)

SEO remains the foundation of discoverability, and WSD delivers full-stack SEO services designed to help clients dominate organic search. Our approach combines technical audits, keyword research, content development, backlink building, and UX-focused site optimization to drive qualified traffic. We align SEO with measurable KPIs like call volume, form fills, and tour bookings—ensuring the results connect directly to business goals.

WSD will focus on code-level, build-related SEO. SEO work that WSD will complete as part of the initial build includes keyword integration, meta data, page titles, descriptions, keywords, sitemap.xml, and Google Analytics. This work provides a great foundation but does not guarantee “page one” results. Ensuring a good organic ranking requires ongoing fine-tuning over a period of many months, and necessitates a more comprehensive, ongoing Digital Marketing solution, which begins with a Foundational Audit & Online Brand Discovery as outlined herein.

AI Optimization (AIO – AEO – GEO)

WSD provides AI-driven solutions beginning with **foundational AI Optimization services**. We believe that every business must consider **AI** integration to remain competitive in today’s digital landscape. Drawing from insights gathered during the initial online brand audit, WSD will focus on **code-level and build-related AI enhancements**, and ongoing digital marketing services that will be discussed and presented in a separate proposal.

AIO (AI Optimization)

At the broadest level, WSD integrates AI into the entire digital ecosystem, helping client’s future-proof their marketing and operations. This includes AI-enhanced analytics dashboards, predictive lead scoring, automated CRM workflows, and personalized content generation. We optimize not just for visibility, but for efficiency and conversion, ensuring every touchpoint is AI-ready and AI-augmented.

AEO (Answer Engine Optimization)

As more users turn to voice assistants, AI-powered chat, and instant-answer platforms, WSD helps clients transition from being “search results” to being “the answer.” We implement structured data, FAQ schema, conversational content, and natural language strategies to align with how modern users ask questions. For clients, this means showing up when a user asks Siri, Alexa, or Google about subject matter that aligns with their brand. By shaping content for answer engines, WSD positions clients to meet prospects at their most urgent decision points.

GEO (Generative Engine Optimization)

WSD is pioneering GEO strategies that prepare clients for the new era of AI-driven search engines like ChatGPT, Gemini, and Perplexity. We work with the client ‘post launch’ to create authoritative, trustworthy, and well-structured content that these engines can draw from when generating synthesized answers. This can include publishing thought leadership, leveraging local knowledge graphs, and ensuring citations in credible sources. The outcome is simple: when AI engines provide recommendations, our clients are the brands mentioned and trusted—an invaluable advantage in the rapidly evolving search landscape. This service starts at the foundational stage – but lasting results require an ongoing digital marketing monthly engagement.

AI Solutions & Strategies

Should the client wish to pursue AI solutions after WSD has performed the initial Digital Marketing Brand Audit, then WSD can provide a separate proposal and implement a phased approach to these services. This begins with **AI Technical Optimization** as outlined above, which then advances into **AI integration strategies** tailored to marketing and customer engagement across multiple online platforms:

Example

AI Chat Bot, AI Agent Integrations, AI Intelligent Content Recommendations, Automated Campaign Optimization, Predictive Analytics for Ad Spend (PPC & Social), and personalized user experiences across web and social platforms. Over time, these enhancements can create a **self-optimizing digital ecosystem** that continuously improves efficiency, reach, ROI and ROAS (Return on Ad Spend).

Schedule

WSD anticipates a development cycle of approximately 60 - 90 business days once Client has approved the site design. Components of the Schedule that are beyond the WSD's direct control include but are not limited to: time required by Client for review/approval, Client content preparation, Client provided content, and registrar access/password acquisition.

Change Orders

If the scope of work alters from what is outlined in this proposal because Client iterates new or additional features, WSD will create a written "Change Order," detailing additional work to be done. WSD will then proceed with additional work upon receipt of a fully executed copy of the Change Order and a fifty percent (50%) deposit. The remaining fifty percent (50%) payment will be due immediately upon completion of the Change Order. Change Orders totaling \$1,000 or less are due, in full, before additional work is initiated.

Accessibility

WSD will make best efforts to meet the WCAG 2.0 standard and when the site is launched, however we accept no liability and Client specifically inures WSD from any responsibility for lawsuits pertaining to the WCAG standard and ADA related claims. Client understands that meeting the WCAG standard is a reoccurring process that must be performed whenever content is added to the site.

Client Responsibilities

This estimate assumes the client will handle most non-technical duties such as providing site text and loading information. Client will additionally be required to provide feedback and review on design, production and programming milestones. WSD will train client on CMS and enable client to post content directly.

Hosting

WSD recommends Client uses a Virtual Private Server (VPS) hosting package which will provide enhanced security and performance for their site. WSD offers managed VPS hosting solutions starting at \$150 per month. Alternatively, the site can be hosted by any 3rd party host, provided they support the required operating system and database applications. Any work performed by WSD to ensure compatibility with 3rd party hosting will be charged at our standard time and materials (T&M) rate of \$175 per hour.

IT Services

WSD has a robust in-house team that understands all aspects of internal IT development and consulting. Should the client require additional support in this area WSD will make itself available. Any work performed by WSD to ensure compatibility with 3rd party systems will be charged at our standard time and materials (T&M) rate of \$175 per hour. WSD will provide a separate T&M agreement for technical support should it be required.

Estimate

Based upon WSD's preliminary understanding of Client's needs, the following is an initial estimate of cost. If material changes occur during the planning phase, WSD will revise the estimate as needed.

Component	Hours	Total
Design & Production		
Strategy & Planning	2	\$350.00
Web Site Design	16	\$2,800.00
Production	12	\$2,100.00
Content Population	2	\$350.00
Subtotal	32	\$5,600.00
Programming		
Content Management System (CMS)	1	\$175.00
Page Manager	1	\$175.00
Team Manager	1	\$175.00
Testimonial Manager	1	\$175.00
Companies Manager	4	\$700.00
Blog / News Module	1	\$175.00
Contact Form	1	\$175.00
Subtotal	10	\$1,750.00
Other		
Project Management	8	\$1,400.00
Quality Assurance	2	\$350.00
Accessibility	2	\$350.00
Foundational - AIO AEO GEO	6	\$1,050.00
SEO	2	\$350.00
Subtotal	20	\$3,500.00
Total	62	\$10,850.00

Terms

WSD bills on a Time & Materials ("T&M") basis, at a rate of \$175, per hour. The Start Date will occur when a fifty percent (50%) deposit is received by WebSight Design. Subsequently, a twenty-five percent (25%) payment is due 45 days after Start Date. An additional twenty percent (20%) will be due 75 days following the Start Date. The final five percent (5%) payment will be due upon site launch. If the project exceeds the amount of time estimated, Client will be billed for all additional work. However, any work exceeding budget will only be completed with specific, advance approval from Client. All work completed by WSD is considered a "work made for hire," and shall be the sole property of Client. There are no refunds.

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Components

Online Brand, AI Evaluation & Recommendations

A full assessment of the client's current digital presence and opportunities for improvement. This includes brand positioning, messaging consistency, and the integration of **AI-driven optimization tools** to enhance visibility, engagement, and efficiency.

Online Profile Direction

Evaluation of essential online profiles to establish credibility, visibility, and accessibility across major platforms. WSD will review existing platforms, put together a list of go forward recommendations and simultaneously aggregate usernames and passwords in preparation for foundational work. Foundational work will be T&M post audit or part of an ongoing DM retainer. These include (but are not limited to):

- Google Business Profile | Google Analytics (tracking & reporting) | YouTube Channel | LinkedIn Business Page | Facebook & Instagram Ad Manager | X | Addition Social Channels (if applicable)

Strategy Consulting & Recommendations

Strategic development to ensure direction remains aligned with business goals. WSD will provide **data-driven recommendations** to refine digital strategies as part of next level engagement.

- Competitor Analysis, Keyword Integrated Research, Digital Footprint Audit, Future Content Planning

Estimate

WSD believes the Digital Marketing Brand Audit will be 10 to 20 hours. The final scope will depend on how many online channels require set up, what aspects of campaign integrations are pursued, and type of ad directive (if any). WSD will do a pre-industry audit with the client and inform them of determined scope - with ongoing list of deliverables.

Terms

WSD bills for Digital Marketing on a Time & Materials ("T&M") basis, at a rate of \$175, per hour. WSD will not exceed an initial 20-hour (\$3,500) budget without advance written approval from the client. A deposit of \$1,000 is required for this work to commence. WSD will present hours itemization and an invoice at the end of each month. Payment terms are Net 15 days the invoice date.