KAUFMAN & COMPANY



BRIDGESTAR PARTNER PORTAL

Vendor Onboarding Packet

How to become an approved Kaufman & Company vendor: the process, the timeline, what we need from you, and who to call.

bridgestar.ai

Version 2.0 · October 2026

Welcome

Thank you for your interest in working with Kaufman & Company. The firms we work with, from recruiters and consultants to contractors and suppliers, are an extension of how we show up for our residents, partners and communities.

This packet sets out exactly how onboarding works so there are no surprises: the six steps, how long each one takes, the documents we need, and the people responsible at each stage. Most vendors are approved within five to seven business days. When a live engagement is waiting, we can move faster.

Start with the checklist at the back of this packet. If anything is unclear, the Admin Team is one email away.

Kaufman & Company Admin Team
admin@kaufmanfamilyoffice.com



Contents

01 About Kaufman & Company
02 Leadership
03 Companies, brands & ventures
04 Pipeline & news
05 Onboarding at a glance
06 Step by step procedures
07 Required documents
08 Recruiting & staffing partners
09 Invoicing & payment
10 Standards of conduct
11 Contacts
12 Onboarding checklist

01

WHO WE ARE

About Kaufman & Company

Kaufman & Company is a permanent capital holding company founded by Daniel Kaufman. It brings real estate development, venture investment and infrastructure under one roof, through ten operating companies built to be run for the long term.

The platform is funded by its own capital and that of the Kaufman family office, alongside select joint venture partners. Kaufman & Company does not raise capital from outside investors or operate investment funds, which lets it make decisions on a long horizon and move quickly when an opportunity is right.

10 OPERATING COMPANIES	7 VENTURE PORTFOLIO COMPANIES	8 BRANDS
$2B+ PROJECT VALUE OVERSEEN	10,000+ UNITS ACROSS ALL ASSET CLASSES	12 CONCEPTS IN THE PIPELINE

Project value and unit figures reflect Daniel Kaufman's full career track record, as stated on thekaufmanco.com, October 2026.

Three disciplines, one platform

Build
DEVELOPMENT

Ground up development across workforce housing, build to rent, mixed use and AI ready data center infrastructure.

Invest
KAUFMAN VENTURES

Venture capital behind seven portfolio companies in property technology, data and infrastructure.

Operate
LIVING & ADVISORY

Convivium Living runs co-living communities; Kaufman Real Estate & Consulting runs the back office and principal side advisory.

What we stand for

We take care of our people and partners
Respect, open doors, and showing up for each other in good times and bad. We share the good news and the bad on the same timeline.

We act with integrity
We tell the truth, honor our promises, own our mistakes, and pay our bills, even when a softer version would be easier to hear.

We strive for extraordinary
High expectations, real execution, smart risks, and rewarding excellence. We focus on execution over talk.



02

THE PEOPLE YOU'LL WORK WITH

Leadership

Daniel Kaufman

FOUNDER & PRINCIPAL



Daniel is a builder and operator whose work spans affordable, mixed income and market rate communities, hotels and resort properties, working across the Mountain West, Texas, Florida, Vermont and the Northeast. His approach is grounded in ground level deal experience rather than theory.

He writes regularly on housing, capital markets and data centers through The Kaufman Report on Substack, Medium and the U.S. Real Estate Journal, hosts The Kaufman Report podcast, and speaks at family office and real estate investment conferences.

> "You don't need another opinion. You need someone who's done it."



Executive team



Daniel Kaufman
Founder & Principal



Rob Davis
President & CIO



Tom Wilson
Chief Financial Officer



David Weston
Chief Technology Officer



Eric Goldberg
Chief Compliance Officer
&
Head of Legal Operations



Jess Dumok
Chief of Staff & Admin Team Lead



Manuel San Ramon
Head of Web & App Development

Kaufman Family Office, Board of Directors

Dan Kaufman Sr., Chairman of the Board · Bruce Kaufman · Seth Kaufman · Jeffrey Kaufman

Leader	Responsibilities
Rob Davis President & CIO	Capital allocation and investment strategy across the platform, underwriting and diligence on new opportunities, and lender and capital partner relationships.
Tom Wilson Chief Financial Officer	Financial strategy, reporting, budgeting, cash management and financial controls for the parent company and operating companies. Vendor payee setup and payments.
David Weston Chief Technology Officer	Technology strategy for Kaufman & Company and Convivium Living, web infrastructure, data systems, IT security and technology vendor relationships.
Eric Goldberg CCO & Head of Legal Operations	Legal strategy, contracts, risk management and the platform's compliance program, overseen by outside counsel. Vendor agreements and compliance review.
Jess Dumok Chief of Staff & Admin Team Lead	Operating rhythm of the leadership team, scheduling, cross team communication and the first point of contact for partners, vendors and new team members.

03

THE PLATFORM

Companies, brands & ventures

As a vendor you may support any of the companies below. Your agreement names the Kaufman & Company entity you contract with.

Operating company	Focus
Kaufman Development	AI infrastructure and mixed use development; operates the Trellis and ZeroPoint brands
Lonestar Kaufman Development Partners	Residential in Dallas, hospitality in Florida, and AI infrastructure joint ventures in Texas and Utah; operates Everwell
DanReDev	Build to rent, workforce and mixed use development, Dallas; operates Foundry
Design Build Affordable	Affordable housing across California, Texas, Ohio, Washington, Vermont and Oklahoma; operates Haven
DK Homes	New construction communities in Maine, New Hampshire and Florida
DEK Builds	Custom mountain homes, resorts and hospitality, Cheyenne, Wyoming; operates Weekender
Forge Development Partners	Urban rental and mixed use, Philadelphia; operates District
Convivium Living	Co-living, residential and hospitality communities; operates Convivium
Kaufman Real Estate & Consulting	Back office, principal side advisory and owner's representation
Kaufman Ventures	Venture capital and the portfolio companies below

Eight brands

Haven
ATTAINABLE HOUSING

Foundry
WORKFORCE HOUSING COMMUNITIES

Trellis
RESIDENTIAL COMMUNITIES

Convivium
CO-LIVING & COMMUNITIES

Everwell
LIVING & WELLNESS

District
MIXED USE DESTINATIONS

Weekender
HOTELS & EXPERIENCES

ZeroPoint
AI INFRASTRUCTURE

Kaufman Ventures portfolio

BridgeStar
Partner, client and vendor portal

Meridian
Portfolio intelligence

LandBriefing
National land opportunity watchlist

SpreadSight
Data and analytics

FoundCheck
Diligence tooling

ServerDomes Global
AI data centers and liquid cooling

Mr. Good Container Homes
Modular and container housing

Joint venture partners

Partner	Relationship
JP Investment Group Nashville	Independent joint venture partner for Nashville development, led by Johnnie Poole.
Oldivai Workforce housing	Partner on modular workforce housing, including Project Zero in Spokane, Washington, led by Dr. John Milne (CEO) and Susan Gillespie (COO).
ServerDomes Global AI infrastructure	Partner with Lonestar Kaufman on the Rio Grande Data Campus (El Paso, Texas) and the Wasatch Data Campus (Utah). Kaufman Ventures is an investor.

Each joint venture partner is independently owned and operated and is not a subsidiary of, or owned or controlled by, Kaufman & Company.

Our work



DEK Builds · Custom mountain homes



DanReDev · Community amenity barn



DK Homes · New construction homes



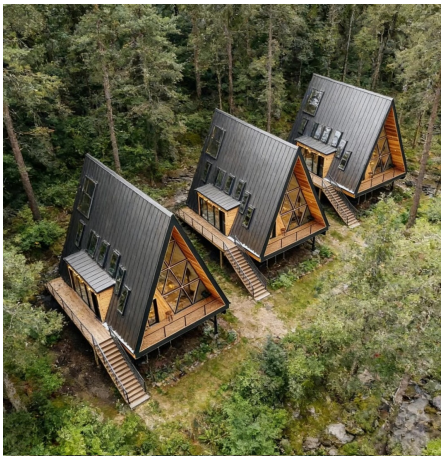
Kaufman Development · Townhome community



Forge Development Partners · Urban townhomes



Convivium Living · Resident clubhouse



DEK Builds · Forest cabins



Factory Row · Jacksonville concept rendering

Photography from the Kaufman & Company operating companies, thekaufmanco.com.

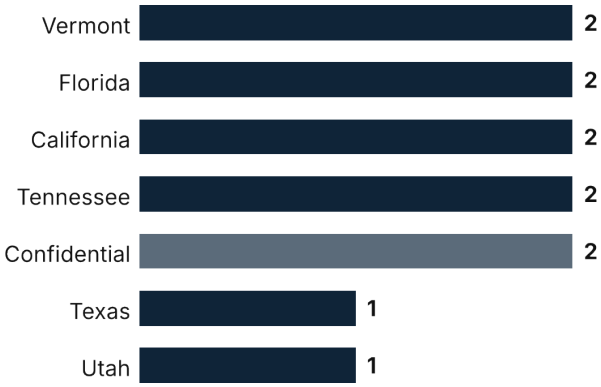
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WHAT WE'RE BUILDING

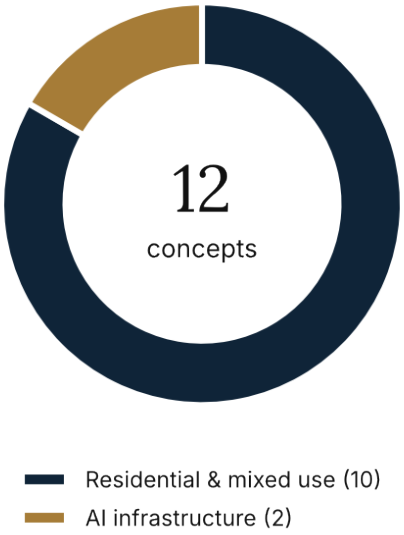
Pipeline & news

Beyond the communities already underway, the platform is advancing twelve new concepts, several with ServerDomes Global and others led by Kaufman Development, Lonestar Kaufman and partner companies. Each is in concept design, predevelopment or underwriting.

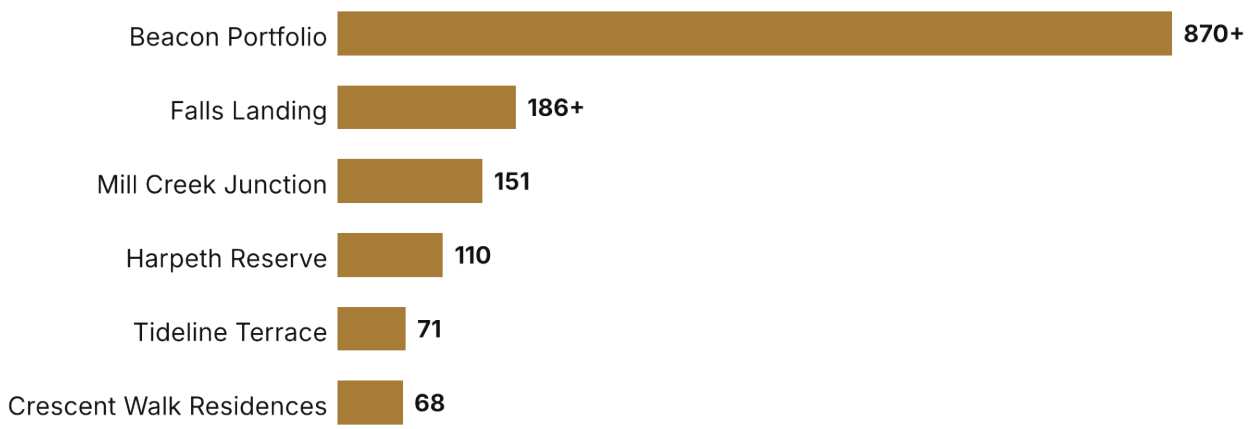
Concepts by market



Concepts by sector



Homes by disclosed concept



Heron Bend, a Southwest Florida master planned concept of roughly 9,690 homes on about 3,400 acres, is shown separately because of its scale.

Concept	Location	Program	Status
Heron Bend	Southwest Florida	~9,690 homes, town center, hospitality, schools	Market study & predevelopment
Orchard Hill Commons	Shelburne, VT	Master planned village community	Concept design
Falls Landing	Winooski, VT	186+ affordable workforce residences	Concept & predevelopment
Factory Row	Jacksonville, FL	Adaptive reuse or modular workforce housing	Feasibility review
Tideline Terrace	Bay Area, CA	71 homes, public plaza and park	Predevelopment & entitlement
Crescent Walk Residences	Los Angeles, CA	68 units, 54 market rate and 14 affordable	Predevelopment & entitlement
Rio Grande Data Campus	El Paso, TX	Hyperscale AI campus with on site power	Site control & power procurement
Wasatch Data Campus	Utah	Hyperscale AI campus with on site power	Early stage development
Harpeth Reserve	Nashville, TN	110 senior living units	Concept & market analysis
Mill Creek Junction	Antioch, TN	151 homes, retail and co-working	Concept & market analysis
Beacon Portfolio	Multiple states	870+ workforce and mixed income units	Confidential

Red Oak Junction	Confidential	Brownfield mixed use redevelopment	Confidential

Pipeline figures are conceptual and preliminary and remain subject to design, entitlement, financing, permitting and market conditions. Source: thekaufmanco.com/pipeline, reviewed October 2026. Nothing here is an offer to sell or a solicitation of an offer to buy any security or interest.

Recent news

OCTOBER 27, 2026
Daniel Kaufman on why the Vail board fight comes down to housing the people who run the mountain

OCTOBER 23, 2026
Kaufman & Company launches People, a unified HR platform for its ten company platform

OCTOBER 13, 2026
ZeroPoint, the AI infrastructure platform, deploys its Project Zero micro data center prototype in Detroit

OCTOBER 8, 2026
Kaufman & Company launches eight brands across every asset class

SEPTEMBER 10, 2026
BUILD 2030, a national initiative bringing housing and AI infrastructure together

SEPTEMBER 3, 2026
Full platform launch, uniting ten operating companies and seven venture portfolio companies

AUGUST 20, 2026
DK Homes launches its new brand with six active communities across the Northeast and Florida

AUGUST 19, 2026
Kaufman & Company launches BridgeStar, its client, borrower and partner portal

AUGUST 12, 2026
Kaufman Real Estate & Consulting launches LandBriefing, a national land opportunity watchlist

Full news, articles and podcast episodes: thekaufmanco.com/media.

05

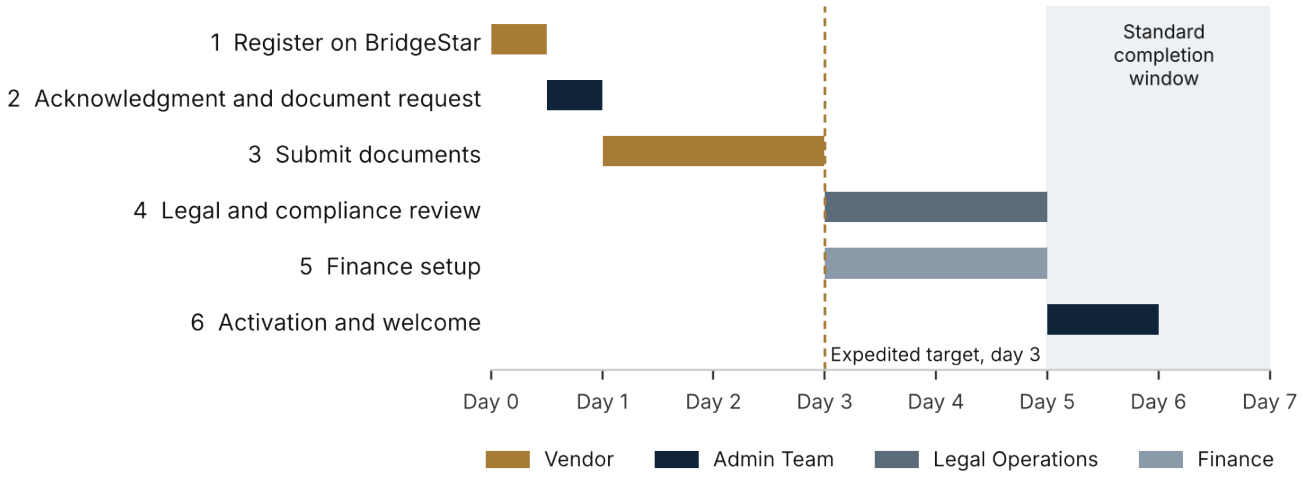
THE PROCESS

Onboarding at a glance

Six steps, clear owners, and a target time for each. Creating your BridgeStar account starts the process; approval follows once your file is complete and Finance and Legal Operations have signed off.

1. **Register** — VENDOR — Day 0
2. **Acknowledge** — ADMIN TEAM — 1 business day
3. **Submit documents** — VENDOR — Days 1 to 3
4. **Legal review** — LEGAL OPERATIONS — 2 business days
5. **Finance setup** — FINANCE — 2 business days
6. **Activation** — ADMIN TEAM — 1 business day

Expected timeline, in business days



Standard track

5 to 7 business days

From registration to activation, when documents are returned within 3 business days.

Expedited track

3 business days

When a live engagement is waiting, such as a candidate ready to submit. Ask for it in your registration note or by email.

06

IN DETAIL

Step by step procedures

Step 1. Register on BridgeStar (Vendor, day 0)

1. Go to bridgestar.ai and select **Create Account**, using your business email address.
2. Choose the relationship type that fits your work. Recruiting and consulting firms choose the advisory or partner option and note that you are a service vendor; contractors choose **Contractor / Trade Partner**.
3. In the notes, list your company name, primary contact, and the Kaufman & Company person or company you are working with.
4. Submit. Sign in stays inactive until approval at Step 6; that is expected.

Step 2. Acknowledgment (Admin Team, within 1 business day)

- The Admin Team reviews new BridgeStar requests every business day.
- You receive an email confirming your request, your point of contact and the document request.
- If a request can't be matched to an engagement, we ask one clarifying question rather than leaving it pending.

Step 3. Document submission (Vendor, days 1 to 3)

- Return the documents in Section 07 by replying to the document request.
- Never send bank account details by email. Payment details are collected securely and verified by phone.

Step 4. Legal and compliance review (Legal Operations, within 2 business days of a complete file)

- Legal Operations reviews your services or placement agreement and returns it for signature, or sends comments.
- Checks include business registration, licensing where required, and insurance where the work calls for it.
- A file is **complete** when every required item has been received; review timelines start then.

Step 5. Finance setup (Finance, runs alongside Step 4)

- Finance reviews your W-9 and sets you up as a payee.
- Payment details are confirmed by phone at a number already on file, never a number supplied in an email.
- Finance confirms invoicing instructions and payment terms.

Step 6. Activation (Admin Team, within 1 business day of sign off)

- Your BridgeStar account is approved and you can sign in.
- You receive a welcome email with your point of contact and any engagement specific instructions.
- Where useful, we schedule a short kickoff call to align on scope, timing and communication.

07

WHAT WE NEED

Required documents

Document	Who needs it	Notes
IRS Form W-9	All U.S. vendors	Signed and current. Non U.S. vendors provide the applicable W-8 form.
Services or placement agreement	All vendors	Provided or reviewed by Legal Operations. Recruiting partners include the placement agreement and fee schedule.
Business registration	All vendors	Certificate of good standing or state registration printout.
Certificate of insurance	Contractors and on site vendors; others if the agreement requires	General liability, plus workers' compensation where required, with Kaufman & Company as certificate holder.
Professional or trade license	Licensed trades and regulated services	License number and issuing state.
Payment details	All vendors	Collected securely and verified by phone. Never by email.
Contact sheet	All vendors	Primary and billing contacts with phone and email.

08

FOR RECRUITERS

Recruiting & staffing partners

Recruiting partners submit candidates through Kaufman People (people.thekaufmanco.com), the Kaufman & Company candidate portal.

Before your first submission

- Your vendor file is complete and your placement agreement is signed.
- If a candidate is waiting, tell the Admin Team and your file moves to the expedited track.

Submitting a candidate

1. Email the Admin Team the candidate's name, the role and the company. That email is your time stamped submission of record.
2. Send the candidate the Kaufman People link. They create an account, choose the role, complete the questionnaire and upload a resume.
3. Ask the candidate to name your firm in the application.

Our commitments to recruiters

- Submissions acknowledged within 1 business day
- Screening decision within 3 business days
- A status update on every submitted candidate at least weekly
- Fees, guarantees and ownership periods governed only by your signed agreement

Candidate timeline

Stage	Target timing
Application received and acknowledged	Within 1 business day
Initial review and screening decision	Within 3 business days
Interviews	Typically 1 to 2 weeks, depending on schedules
Conditional offer	After final interview
Background check disclosure and authorization	Completed in Kaufman People after a conditional offer, run by our licensed background check provider
Start date and onboarding	Agreed with the candidate at offer

09

GETTING PAID

Invoicing & payment

- Send invoices to admin@kaufmanfamilyoffice.com with the engagement name, the Kaufman & Company entity you contracted with, and your remit details on file.
- Payment terms follow your signed agreement. Where the agreement is silent, approved invoices are paid Net 30 from receipt.
- Recruiting fees are invoiced on the trigger in your placement agreement, for example the candidate's start date.

Wire fraud warning

Kaufman & Company will never send or change payment instructions by email alone, and we expect the same of you. If an email that appears to come from us asks you to change bank details or send funds, do not act on it. Call the Admin Team at a number you already know.

10

HOW WE WORK TOGETHER

Standards of conduct

Confidentiality
Information about our deals, people and properties is confidential. Use it only for your engagement.

Our name and brands
Do not use the Kaufman & Company name, logos or relationship in marketing without written approval.

Personal data
Protect candidate files, resumes and contact details, and delete them when the engagement ends unless the law requires otherwise.

Gifts and conflicts
No gifts beyond ordinary business courtesy. Tell us right away about any conflict of interest.

Security incidents
Report any incident affecting our information immediately to the Admin Team.

Safety on site
Follow site specific safety rules and required protective equipment on every visit.

11

WHO TO CALL

Contacts

Topic	Contact
Registration, scheduling, onboarding status	**Admin Team**, Jess Dumok, Admin Team Lead admin@kaufmanfamilyoffice.com
Invoices, payee setup, payments	**Finance**, Tom Wilson, Chief Financial Officer tom@thekaufmanco.com
Agreements, compliance, legal questions	**Legal Operations**, Eric Goldberg, Chief Compliance Officer and Head of Legal Operations eric@thekaufmanco.com
Press and media	media@kaufmanredev.com
Vendor portal	bridgestar.ai
Candidate portal	people.thekaufmanco.com

12

TRACK YOUR FILE

Onboarding checklist

	Item	Owner
☐	BridgeStar account request submitted with company name and engagement in the notes	Vendor
☐	Acknowledgment email received with document request	Admin Team
☐	W-9 (or W-8) returned	Vendor
☐	Services or placement agreement signed by both parties	Vendor & Legal Operations
☐	Business registration provided	Vendor
☐	Certificate of insurance and license provided, if applicable	Vendor
☐	Payment details collected securely and verified by phone	Finance
☐	Primary and billing contacts provided	Vendor
☐	BridgeStar account approved and welcome email sent	Admin Team
☐	Recruiting partners: first candidate submission emailed to the Admin Team	Vendor

This packet describes our standard process. Your signed agreement controls if anything here differs from it. The current version is always available on bridgestar.ai.



Kaufman & Company

A permanent capital holding company

Vendor onboarding: admin@kaufmanfamilyoffice.com
Partner portal: bridgestar.ai · thekaufmanco.com