



Authorization for Credit Card Transactions

Department of Homeland Security

Form G-1450

How To Fill Out Form G-1450

1. Type or print legibly in black ink.
2. Complete the "Applicant's/Petitioner's/Requester's Information," "Credit Card Billing Information," and "Credit Card Information" sections and sign the authorization. **NOTE:** The credit card must be issued by a U.S. bank.
3. Place your Form G-1450 ON TOP of your application, petition, or request package.

NOTE: Failure to provide the requested information may result in DHS and your financial institution not accepting the payment. DHS cannot process credit card payments without an authorized signature.

NOTE: Please see the USCIS Form G-1450 website for additional information.

We recommend that you print or save a copy of your completed Form G-1450 to review in the future and for your records.

By completing this transaction, you agree that you have paid for a government service and that the filing fee, biometric services fee and all related financial transactions are final and not refundable, regardless of any action DHS takes on an application, petition, or request. You must submit all fees in the exact amounts. DHS will charge your credit card up to the amount you authorize below.

Please refer to the form(s) you are filing for additional information, or you may call the USCIS Customer Contact number at **1-800-375-5283**. For TTY (deaf or hard of hearing) call: **1-800-767-1833**.

Applicant's/Petitioner's/Requester's Information (Full Legal Name)			
Given Name (First Name) Antonio		Middle Name (if any) N/A	Family Name (Last Name) DE AZEVEDO DONATTI
Credit Card Billing Information (Credit Card Holder's Name as it Appears on the Card)			
Given Name (First Name)		Middle Name (if any)	Family Name (Last Name)
Credit Card Holder's Billing Address:			
Street Number and Name		Apt. Ste. Flr. ☐ ☐ ☐	Number
City or Town		State	ZIP Code
Credit Card Holder's Signature and Contact Information:			
Credit Card Holder's Signature			
Credit Card Holder's Daytime Telephone Number		Credit Card Holder's Email Address	
Credit Card Information			
Credit Card Number	Credit Card Type: ☐ Visa ☐ MasterCard ☐ American Express ☐ Discover		Authorized Payment Amount \$ 715.00
Credit Card Expiration Date CVV Code (mm/yyyy)			





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Department of Homeland Security

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Applicant's/Petitioner's/Requester's Information (Full Legal Name)			
Given Name (First Name) Antonio		Middle Name (if any) N/A	Family Name (Last Name) DE AZEVEDO DONATTI
Credit Card Billing Information (Credit Card Holder's Name as it Appears on the Card)			
Given Name (First Name)		Middle Name (if any)	Family Name (Last Name)
Credit Card Holder's Billing Address:			
Street Number and Name		Apt. Ste. Flr. ☐ ☐ ☐	Number
City or Town		State	ZIP Code
Credit Card Holder's Signature and Contact Information:			
Credit Card Holder's Signature			
Credit Card Holder's Daytime Telephone Number		Credit Card Holder's Email Address	
Credit Card Information			
Credit Card Number	Credit Card Type: ☐ Visa ☐ MasterCard ☐ American Express ☐ Discover		Authorized Payment Amount \$ 300.00
Credit Card Expiration Date CVV Code (mm/yyyy)			





Employment-Based Second Preference (EB-2) Immigrant
Petition with Request for National Interest Waiver

Petitioner: DONATTI, Antonio de Azevedo

HS Law Corp
P.O Box 90487
San Diego - CA - United States

TABLE OF CONTENTS

Petitioner: Antonio de Azevedo Donatti

Type of Petition: I-140, EB-2 National Interest Waiver

Classification Sought: Immigration and Nationality Act § 203(b)(2)(B)

STEM Academic Background: CIP Series 11 – Computer and Information Sciences and Support Services / Bachelor of Science in Information Systems)

<u>Forms</u>	• Form G-1450 in the amount of \$715 towards I-140 form filling fee • Form G-1450 in the amount of \$300 towards Asylum Program Fee • Form G-1145 • Form G-28 • Form I-140 • ETA-9089
<u>Petition Cover Letter</u>	• Summary of Cover Letter • Petition Cover Letter • Exhibit List
<u>Exhibit A</u>	Curriculum Vitae of Antonio de Azevedo Donatti
<u>Exhibit B</u> ELIGIBILITY CRITERIA	Advanced Degree: • Bachelor's in Information Systems – Diploma and Transcript - Universidade Federal de Santa Catarina – UFSC, 2017 - About Universidade Federal de Santa Catarina (UFSC) • Executive MBA in Management with Emphasis in Project Management – Diploma and Transcript - Fundação Getulio Vargas – FGV, 2023 - About Fundação Getulio Vargas (FGV) • Academic Credential Evaluation • Professional Experience Records: 1. Laboratório Bridge – March 2014 to December 2017 2. EMS Ventura Ltda. –December 2017 to Present
<u>Exhibit C</u> NATIONAL INTEREST WAIVER	C.I – First Prong – Substantial Merit and National Importance: • Business Plan for IntellexIA Health Technologies • Government and Policy Materials Supporting AI, Healthcare Efficiency, Interoperability, and Price Transparency: 1. DHS STEM Designated Degree Program List 2. White House – America's AI Action Plan 3. White House – Removing Barriers to American Leadership in Artificial Intelligence

4. White House – Unlocking Cures for Pediatric Cancer with Artificial Intelligence
5. White House – Healthcare Price Transparency Executive Order
6. White House Fact Sheet – Healthcare Price Transparency
7. U.S. Bureau of Labor Statistics – Project Management Specialists
8. O*NET Online – Project Management Specialists, 13-1082.00
9. Project Management Institute – PMP® Certification Materials

C.II – Second Prong – Well-Positioned to Advance the Proposed Endeavor:

- All the documents of Exhibit B
- Project Management Professional Certification - PMP®
- Project Management Institute - PMI Membership
- Certified Scrum Product Owner Certification - CSPO®
- Generative Artificial Intelligence / AI-Related Certificates
- Letters of Support and Resume:
 1. Ms. Cláudia Cunha – OPME Purchasing Coordinator, Saúde Petrobras
 2. Mr. Eduardo Porto – Regional Manager, Sherwin-Williams Automotive Finishes
 3. Mr. Lucas Postal – Project Supervisor / Legal Representative, Laboratório Bridge / UFSC (See Exhibit B - Eligibility Criteria: Professional Experience Records – Laboratório Bridge)
 4. Ms. Luíza Reis – Manager of OPME and Medications, Unimed do Brasil – National Confederation of Medical Cooperatives
 5. Ms. Priscilla Araujo Ferreira – Hospital Supplies Supervisor, Unimed Nacional
 6. Mr. Robson Oliveira – Administrative Specialist, Decision / Associação Petrobras de Saúde APS
- Financial Feasibility and Personal Asset Evidence:
 1. Market Appraisal Report – Property Located at Rua Tenente Silveira, No. 600, Apartment 707, Florianópolis/SC
 2. Real Estate Registration No. 11,037 – 1st Registry Office of Deeds and Real Estate Records of Florianópolis
 3. Brazilian Income Tax Return – IRPF 2023 to 2025
 4. Accountant Letter – Income Progression from 2020 to 2024 and Salary Benchmark Comparison

C.III – Third Prong – Waiver of Job Offer and Labor Certification

- All the documents of Exhibit C.I and Exhibit C.II

<u>Exhibit D</u> PERSONAL DOCUMENTS	● Birth Certificate and Corresponding Translation ● Passport's Biometrics Page ● US Visa ● Marriage Certificate and Corresponding Translation ● Derivative's Birth Certificate and Corresponding Translation ● Derivative's Passport Biometrics ● Derivative's US Visa
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e-Notification of Application/Petition Acceptance

Department of Homeland Security
U.S. Citizenship and Immigration Services

USCIS
Form G-1145

What Is the Purpose of This Form?

Use this form to request an electronic notification (e-Notification) when U.S. Citizenship and Immigration Services accepts your immigration application. This service is available for applications filed at a USCIS Lockbox facility.

General Information

Complete the information below and clip this form to the first page of your application package. You will receive one e-mail and/or text message for each form you are filing.

We will send the e-Notification within 24 hours after we accept your application. Domestic customers will receive an e-mail and/or text message; overseas customers will only receive an e-mail. Undeliverable e-Notifications cannot be resent.

The e-mail or text message will display your receipt number and tell you how to get updated case status information. It will not include any personal information. The e-Notification does not grant any type of status or benefit; rather it is provided as a convenience to customers.

USCIS will also mail you a receipt notice (I-797C), which you will receive within 10 days after your application has been accepted; use this notice as proof of your pending application or petition.

USCIS Privacy Act Statement

AUTHORITIES: The information requested on this form is collected pursuant to section 103(a) of the Immigration and Nationality Act, as amended INA section 101, et seq.

PURPOSE: The primary purpose for providing the information on this form is to request an electronic notification when USCIS accepts immigration form. The information you provide will be used to send you a text and/or email message.

DISCLOSURE: The information you provide is voluntary. However, failure to provide the requested information may prevent USCIS from providing you a text and/or email message receipting your immigration form.

ROUTINE USES: The information provided on this form will be used by and disclosed to DHS personnel and contractors in accordance with approved routine uses, as described in the associated published system of records notices [**DHS/USCIS-007 - Benefits Information System and DHS/USCIS-001 - Alien File (A-File) and Central Index System (CIS)**], which can be found at www.dhs.gov/privacy. The information may also be made available, as appropriate for law enforcement purposes or in the interest of national security.

Complete this form and clip it on top of the first page of your immigration form(s).

Applicant/Petitioner Full Last Name DE AZEVEDO DONATTI	Applicant/Petitioner Full First Name Antonio	Applicant/Petitioner Full Middle Name N/A
Email Address antoniodonatti@hotmail.com		Mobile Phone Number (Text Message)





**Notice of Entry of Appearance
as Attorney or Accredited Representative**
Department of Homeland Security

DHS
Form G-28
OMB No. 1615-0105
Expires 05/31/2021

Part 1. Information About Attorney or Accredited Representative

1. USCIS Online Account Number (if any)

▶ 0 0 7 4 9 2 6 2 5 4 3 8

Name of Attorney or Accredited Representative

2.a. Family Name (Last Name) **HAVERROTH SILVA**

2.b. Given Name (First Name) **Otavio**

2.c. Middle Name **N/A**

Address of Attorney or Accredited Representative

3.a. Street Number and Name **PO Box 90487**

3.b. ☐ Apt. ☐ Ste. ☐ Flr. **N/A**

3.c. City or Town **San Diego**

3.d. State **CA** 3.e. ZIP Code **92169**
(USPS ZIP Code Lookup)

3.f. Province **N/A**

3.g. Postal Code **N/A**

3.h. Country

USA

Contact Information of Attorney or Accredited Representative

4. Daytime Telephone Number

5102419336

5. Mobile Telephone Number (if any)

5102419336

6. Email Address (if any)

otavio@legalhs.com

7. Fax Number (if any)

N/A

Part 2. Eligibility Information for Attorney or Accredited Representative

Select **all** applicable items.

- 1.a. ☒ I am an attorney eligible to practice law in, and a member in good standing of, the bar of the highest courts of the following states, possessions, territories, commonwealths, or the District of Columbia. If you need extra space to complete this section, use the space provided in **Part 6. Additional Information**.

Licensing Authority

California

1.b. Bar Number (if applicable)

343486

- 1.c. I (select **only one** box) ☒ am not ☐ am subject to any order suspending, enjoining, restraining, disbaring, or otherwise restricting me in the practice of law. If you are subject to any orders, use the space provided in **Part 6. Additional Information** to provide an explanation.

1.d. Name of Law Firm or Organization (if applicable)

HS Law Corp

- 2.a. ☐ I am an accredited representative of the following qualified nonprofit religious, charitable, social service, or similar organization established in the United States and recognized by the Department of Justice in accordance with 8 CFR part 1292.

2.b. Name of Recognized Organization

N/A

2.c. Date of Accreditation (mm/dd/yyyy)

N/A

3. ☐ I am associated with

N/A

the attorney or accredited representative of record who previously filed Form G-28 in this case, and my appearance as an attorney or accredited representative for a limited purpose is at his or her request.

- 4.a. ☐ I am a law student or law graduate working under the direct supervision of the attorney or accredited representative of record on this form in accordance with the requirements in 8 CFR 292.1(a)(2).

4.b. Name of Law Student or Law Graduate

N/A



Part 3. Notice of Appearance as Attorney or Accredited Representative

If you need extra space to complete this section, use the space provided in **Part 6. Additional Information**.

This appearance relates to immigration matters before (select **only one** box):

- 1.a. ☒ U.S. Citizenship and Immigration Services (USCIS)
- 1.b. List the form numbers or specific matter in which appearance is entered.
I-140, ETA 9089
- 2.a. ☐ U.S. Immigration and Customs Enforcement (ICE)
- 2.b. List the specific matter in which appearance is entered.
N/A
- 3.a. ☐ U.S. Customs and Border Protection (CBP)
- 3.b. List the specific matter in which appearance is entered.
N/A
4. Receipt Number (if any)
▶ **N/A**
5. I enter my appearance as an attorney or accredited representative at the request of the (select **only one** box):
☐ Applicant ☒ Petitioner ☐ Requestor
☐ Beneficiary/Derivative ☐ Respondent (ICE, CBP)

Information About Client (Applicant, Petitioner, Requestor, Beneficiary or Derivative, Respondent, or Authorized Signatory for an Entity)

- 6.a. Family Name (Last Name) **DE AZEVEDO DONATTI**
- 6.b. Given Name (First Name) **Antonio**
- 6.c. Middle Name **N/A**
- 7.a. Name of Entity (if applicable)
N/A
- 7.b. Title of Authorized Signatory for Entity (if applicable)
N/A
8. Client's USCIS Online Account Number (if any)
▶
9. Client's Alien Registration Number (A-Number) (if any)
▶ A-

Client's Contact Information

10. Daytime Telephone Number
+55 (48) 98408-6565
11. Mobile Telephone Number (if any)
+55 (48) 98408-6565
12. Email Address (if any)
antoniodonatti@hotmail.com

Mailing Address of Client

NOTE: Provide the client's mailing address. **Do not** provide the business mailing address of the attorney or accredited representative **unless** it serves as the safe mailing address on the application or petition being filed with this Form G-28.

- 13.a. Street Number and Name **PO Box 90487**
- 13.b. ☐ Apt. ☐ Ste. ☐ Flr. **N/A**
- 13.c. City or Town **San Diego**
- 13.d. State **CA** 13.e. ZIP Code **92169**
- 13.f. Province **N/A**
- 13.g. Postal Code **N/A**
- 13.h. Country
USA

Part 4. Client's Consent to Representation and Signature

Consent to Representation and Release of Information

I have requested the representation of and consented to being represented by the attorney or accredited representative named in **Part 1.** of this form. According to the Privacy Act of 1974 and U.S. Department of Homeland Security (DHS) policy, I also consent to the disclosure to the named attorney or accredited representative of any records pertaining to me that appear in any system of records of USCIS, ICE, or CBP.



Part 4. Client's Consent to Representation and Signature (continued)

Options Regarding Receipt of USCIS Notices and Documents

USCIS will send notices to both a represented party (the client) and his, her, or its attorney or accredited representative either through mail or electronic delivery. USCIS will send all secure identity documents and Travel Documents to the client's U.S. mailing address.

If you want to have notices and/or secure identity documents sent to your attorney or accredited representative of record rather than to you, please select **all applicable** items below. You may change these elections through written notice to USCIS.

- 1.a. ☒ I request that USCIS send original notices on an application or petition to the business address of my attorney or accredited representative as listed in this form.
- 1.b. ☒ I request that USCIS send any secure identity document (Permanent Resident Card, Employment Authorization Document, or Travel Document) that I receive to the U.S. business address of my attorney or accredited representative (or to a designated military or diplomatic address in a foreign country (if permitted)).
- NOTE:** If your notice contains Form I-94, Arrival-Departure Record, USCIS will send the notice to the U.S. business address of your attorney or accredited representative. If you would rather have your Form I-94 sent directly to you, select **Item Number 1.c.**
- 1.c. ☐ I request that USCIS send my notice containing Form I-94 to me at my U.S. mailing address.

Signature of Client or Authorized Signatory for an Entity

- 2.a. Signature of Client or Authorized Signatory for an Entity
➡ Antonio Donatti
- 2.b. Date of Signature (mm/dd/yyyy) 02/04/2026

Part 5. Signature of Attorney or Accredited Representative

I have read and understand the regulations and conditions contained in 8 CFR 103.2 and 292 governing appearances and representation before DHS. I declare under penalty of perjury under the laws of the United States that the information I have provided on this form is true and correct.

1. a. Signature of Attorney or Accredited Representative

- 1.b. Date of Signature (mm/dd/yyyy) 02/04/2026
- 2.a. Signature of Law Student or Law Graduate
N/A
- 2.b. Date of Signature (mm/dd/yyyy) N/A



Part 6. Additional Information

If you need extra space to provide any additional information within this form, use the space below. If you need more space than what is provided, you may make copies of this page to complete and file with this form or attach a separate sheet of paper. Type or print your name at the top of each sheet; indicate the **Page Number**, **Part Number**, and **Item Number** to which your answer refers; and sign and date each sheet.

1.a	Family Name (Last Name)	DE AZEVEDO DONATTI
-----	----------------------------	--------------------

1.b. Given Name (First Name)	Antonio
---------------------------------	---------

1.c. Middle Name	N/A
------------------	-----

2.a. Page Number	2.b. Part Number	2.c. Item Number
N/A	N/A	N/A

2.d.

N/A

3.a. Page Number **3.b.** Part Number **3.c.** Item Number

N/A **N/A** **N/A**

3.d.

N/A

4.a. Page Number	4.b. Part Number	4.c. Item Number
N/A	N/A	N/A

4.d.

N/A

5.a. Page Number	5.b. Part Number	5.c. Item Number
N/A	N/A	N/A

5.d.

N/A

6.a. Page Number **6.b.** Part Number **6.c.** Item Number

6.d.

N/A





Immigrant Petition for Alien Workers

Department of Homeland Security
U.S. Citizenship and Immigration Services

USCIS
Form I-140
OMB No. 1615-0015
Expires 02/28/2027

For USCIS Use Only	Fee Stamp	Priority Date	Consulate	Action Block
	Classification ☐ 203(b)(1)(A) Alien of Extraordinary Ability ☐ 203(b)(1)(B) Outstanding Professor or Researcher ☐ 203(b)(1)(C) Multinational Executive or Manager ☐ 203(b)(2) Member of Professions with Advanced Degree/Exceptional Ability ☐ 203(b)(3)(A)(i) Skilled Worker ☐ 203(b)(3)(A)(ii) Professional ☐ 203(b)(3)(A)(iii) Other Worker		Certification ☐ National Interest Waiver (NIW) ☐ Schedule A, Group I ☐ Schedule A, Group II	
	Remarks			

To be completed by an Attorney or Accredited Representative (if any).	☒ Select this box if Form G-28 or Form G-28I is attached.	Attorney State Bar Number (if applicable) 343486	Attorney or Accredited Representative USCIS Online Account Number (if any) 0 0 7 4 9 2 6 2 5 4 3 8
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► **START HERE - Type or print in black ink.**

Part 1. Information About the Person or Organization Filing This Petition

If an individual is filing this petition, answer **Item Numbers 1.a. - 1.c.** If a company or organization is filing this petition, answer **Item Number 2.**

1.a. Family Name (Last Name)	DE AZEVEDO DONATTI
1.b. Given Name (First Name)	Antonio
1.c. Middle Name	N/A
2. Company or Organization Name	N/A

Mailing Address [\(USCIS ZIP Code Lookup\)](#)

3.a. In Care Of Name	Otavio Haverroth Silva
3.b. Street Number and Name	PO Box 90487
3.c. ☐ Apt. ☐ Ste. ☐ Flr.	N/A
3.d. City or Town	San Diego
3.e. State CA	3.f. ZIP Code 92169
3.g. Province	N/A
3.h. Postal Code	N/A
3.i. Country	USA

Other Information

4. IRS Employer Identification Number (EIN)	► N/A
5. Are you a nonprofit organized as tax exempt or a governmental research organization?	☐ Yes ☒ No
6. Do you currently employ a total of 25 or fewer full-time equivalent employees in the United States, including all affiliates or subsidiaries of this company/organization?	☒ Yes ☐ No
7. U.S. Social Security Number (SSN) (if any)	► N/A
8. USCIS Online Account Number (if any)	► N/A

Part 2. Petition Type

This petition is being filed for (select **only one** box):

1.a. ☐ An alien of extraordinary ability.
1.b. ☐ An outstanding professor or researcher.
1.c. ☐ A multinational executive or manager.
1.d. ☐ A member of the professions holding an advanced degree or an alien of exceptional ability (who is NOT seeking a National Interest Waiver (NIW)).
1.e. ☐ A professional (at a minimum, possessing a bachelor's degree or a foreign degree equivalent to a U.S. bachelor's degree).



Part 2. Petition Type (continued)

- 1.f. ☐ A skilled worker (requiring at least two years of specialized training or experience).
- 1.g. ☐ Any other worker (requiring less than two years of training or experience).
- 1.h. ☒ An alien applying for an NIW (who **IS** a member of the professions holding an advanced degree or an alien of exceptional ability).

This petition is being filed (select **only one** box):

- 2.a. ☐ To amend a previously filed petition.

Previous Petition Receipt Number

► N/A

- 2.b. ☐ For the Schedule A, Group I or II designation.

Part 3. Information About the Person for Whom You Are Filing

- 1.a. Family Name (Last Name) DE AZEVEDO DONATTI
- 1.b. Given Name (First Name) Antonio
- 1.c. Middle Name N/A

Mailing Address

- 2.a. In Care Of Name
Otavio Haverroth Silva
- 2.b. Street Number and Name
PO Box 90487
- 2.c. ☐ Apt. ☐ Ste. ☐ Flr. N/A
- 2.d. City or Town
San Diego
- 2.e. State CA 2.f. ZIP Code 92169
- 2.g. Province
N/A
- 2.h. Postal Code
N/A
- 2.i. Country
USA

Other Information

3. Date of Birth (mm/dd/yyyy) 12/27/1992
4. City/Town/Village of Birth
Florianopolis
5. State or Province of Birth
Santa Catarina

6. Country of Birth
Brazil
7. Country of Citizenship or Nationality
Brazil
8. Alien Registration Number (A-Number) (if any)
► A- N/A
9. U.S. SSN (if any) ► N/A

Information About His or Her Last Arrival in the United States

If the person for whom you are filing is in the United States, provide the following information.

10. Date of Last Arrival (mm/dd/yyyy) N/A
- 11.a. Form I-94 Arrival-Departure Record Number
► N/A
- 11.b. Expiration Date of Authorized Stay Shown on Form I-94 (mm/dd/yyyy) N/A
- 11.c. Status on Form I-94 (for example, class of admission, or paroled, if paroled)
N/A
12. Passport Number
N/A
13. Travel Document Number
N/A
14. Country of Issuance for Passport or Travel Document
N/A
15. Expiration Date for Passport or Travel Document (mm/dd/yyyy) N/A

Part 4. Processing Information

Provide the following information for the person named in **Part 3.** (select **only one** box):

- 1.a. ☒ Alien will apply for a visa abroad at a U.S. Embassy or U.S. Consulate at:
- 1.b. City or Town
Rio de Janeiro
- 1.c. Country
Brazil
- 2.a. ☐ Alien is in the United States and will apply for adjustment of status to that of lawful permanent resident.

Part 4. Processing Information (continued)

- 2.b. Alien's current country of residence or, if now in the United States, last country of permanent residence abroad.

Brazil

If you provided a United States address in **Part 3.**, provide the person's foreign address in **Item Numbers 3.a. - 3.f.**:

- 3.a. Street Number and Name St 600 Tenente Silveira

- 3.b. ☒ Apt. ☐ Ste. ☐ Flr. 707

- 3.c. City or Town Florianopolis

- 3.d. Province Santa Catarina

- 3.e. Postal Code 88010301

- 3.f. Country

Brazil

If the person's native alphabet is other than Roman letters, type or print the person's foreign name and address in the native alphabet in **Item Numbers 4.a. - 5.g.**:

- 4.a. Family Name (Last Name) N/A

- 4.b. Given Name (First Name) N/A

- 4.c. Middle Name N/A

Mailing Address

- 5.a. In Care Of Name

N/A

- 5.b. Street Number and Name N/A

- 5.c. ☐ Apt. ☐ Ste. ☐ Flr. N/A

- 5.d. City or Town N/A

- 5.e. Province N/A

- 5.f. Postal Code N/A

- 5.g. Country

N/A

If you answer "Yes" to **Item Numbers 6.a. - 10.**, provide the case number, office location, date of decision, and disposition of the decision in the space provided in **Part 11. Additional Information.**

- 6.a. Are you filing any other petitions or applications with this Form I-140? ☐ Yes ☒ No

- 6.b. If you answered "Yes" to **Item Number 6.a.**, select all applicable boxes:

☐ Form I-485

☐ Form I-131

☐ Form I-765

☐ Other (Provide an explanation in **Part 11. Additional Information.**)

7. Is the person for whom you are filing in removal proceedings? ☐ Yes ☒ No

8. Has any immigrant visa petition ever been filed by or on behalf of this person? ☐ Yes ☒ No

9. Are you filing this petition without an original labor certification because the original labor certification was previously submitted in support of another Form I-140? ☐ Yes ☒ No

10. If you are filing this petition without an original labor certification, are you requesting that U.S. Citizenship and Immigration Services (USCIS) request a duplicate labor certification from the Department of Labor (DOL)? ☐ Yes ☒ No

Part 5. Additional Information About the Petitioner

Type of petitioner (select **only one** box):

- 1.a. ☐ Employer

- 1.b. ☒ Self

- 1.c. ☐ Other (For example, Lawful Permanent Resident, U.S. citizen or any other person filing on behalf of the alien)

N/A

If a company or an organization is filing this petition, provide the following information:

2. Type of Business

N/A

3. Date Established (mm/dd/yyyy) N/A

4. Current Number of U.S. Employees N/A

5. Gross Annual Income \$ N/A

6. Net Annual Income \$ N/A

7. NAICS Code ▶ N/A

8. Labor Certification DOL Case Number

N/A

Part 5. Additional Information About the Petitioner (continued)

9. Labor Certification DOL Filing Date (mm/dd/yyyy)

N/A

10. Labor Certification Expiration Date (mm/dd/yyyy)

N/A

If an individual is filing this petition, provide the following information.

11. Occupation

Computer and Information Systems Manager

12. Annual Income

\$ N/A

Part 6. Basic Information About the Proposed Employment

1. Job Title

General and Operations Managers

2. SOC Code

► 1 1 - 1 0 2 1

3. Nontechnical Job Description

See page 8.

4. Is this a full-time position?

☒ Yes ☐ No

5. If the answer to **Item Number 4.** is "No," how many hours per week for the position?

N/A

6. Is this a permanent position?

☒ Yes ☐ No

7. Is this a new position?

☒ Yes ☐ No

8. Wages (Specify hour, week, month, or year):

\$ 110,000.00 per year

Worksite Location

For **Item Numbers 9.a. - 9.e.**, provide the address where the person will work if different from the address provided in **Part 1.**

9.a. Street Number and Name

To be determined

9.b. ☐ Apt. ☐ Ste. ☐ Flr.

To be determined

9.c. City or Town

Naples

9.d. State

FL

9.e. ZIP Code

To be determined

Part 7. Information About the Spouse and All Children of the Person for Whom You Are Filing

For **Part 7.**, provide information on the spouse and all children related to the individual for whom you are filing this petition. Also, note if the individual will apply for a visa abroad or adjustment of status as the dependent of the individual for whom the petition is filed. If you need extra space to provide information about additional family members, use the space provided in **Part 11. Additional Information.**

Person 1

1.a. Family Name (Last Name)

TONOLLI POLLI DONATTI

1.b. Given Name (First Name)

Ana Luiza

1.c. Middle Name

N/A

2. Date of Birth (mm/dd/yyyy)

02/14/1989

3. Country of Birth

Brazil

4. Relationship

Spouse

5. Is he or she applying for adjustment of status?

☐ Yes ☒ No

6. Is he or she applying for a visa abroad?

☒ Yes ☐ No

Person 2

7.a. Family Name (Last Name)

N/A

7.b. Given Name (First Name)

N/A

7.c. Middle Name

N/A

8. Date of Birth (mm/dd/yyyy)

N/A

9. Country of Birth

N/A

10. Relationship

N/A

11. Is he or she applying for adjustment of status?

☐ Yes ☐ No

12. Is he or she applying for a visa abroad?

☐ Yes ☐ No

Part 7. Information About Spouse and All Children of the Person for Whom You Are Filing (continued)

Person 3

- 13.a. Family Name (Last Name) **N/A**
- 13.b. Given Name (First Name) **N/A**
- 13.c. Middle Name **N/A**
14. Date of Birth (mm/dd/yyyy) **N/A**
15. Country of Birth **N/A**
16. Relationship **N/A**
17. Is he or she applying for adjustment of status?
☐ Yes ☐ No
18. Is he or she applying for a visa abroad?
☐ Yes ☐ No

Person 4

- 19.a. Family Name (Last Name) **N/A**
- 19.b. Given Name (First Name) **N/A**
- 19.c. Middle Name **N/A**
20. Date of Birth (mm/dd/yyyy) **N/A**
21. Country of Birth **N/A**
22. Relationship **N/A**
23. Is he or she applying for adjustment of status?
☐ Yes ☐ No
24. Is he or she applying for a visa abroad?
☐ Yes ☐ No

Person 5

- 25.a. Family Name (Last Name) **N/A**
- 25.b. Given Name (First Name) **N/A**
- 25.c. Middle Name **N/A**
26. Date of Birth (mm/dd/yyyy) **N/A**
27. Country of Birth **N/A**
28. Relationship **N/A**
29. Is he or she applying for adjustment of status?
☐ Yes ☐ No
30. Is he or she applying for a visa abroad?
☐ Yes ☐ No

Person 6

- 31.a. Family Name (Last Name) **N/A**
- 31.b. Given Name (First Name) **N/A**
- 31.c. Middle Name **N/A**
32. Date of Birth (mm/dd/yyyy) **N/A**
33. Country of Birth **N/A**
34. Relationship **N/A**
35. Is he or she applying for adjustment of status?
☐ Yes ☐ No
36. Is he or she applying for a visa abroad?
☐ Yes ☐ No



Part 8. Contact Information, Certification, and Signature of the Petitioner or Authorized Signatory

Petitioner or Authorized Signatory's Contact Information

- 1.a. Petitioner's or Authorized Signatory's Family Name (Last Name)
DE AZEVEDO DONATTI
- 1.b. Petitioner's or Authorized Signatory's Given Name (First Name)
Antonio
2. Petitioner's or Authorized Signatory's Title
N/A
3. Petitioner's or Authorized Signatory's Daytime Telephone Number
+55 (48) 98408-6565
4. Petitioner's or Authorized Signatory's Mobile Telephone Number (if any)
+55 (48) 98408-6565
5. Petitioner's or Authorized Signatory's Email Address (if any)
antoniodonatti@hotmail.com

Petitioner's or Authorized Signatory's Certification and Signature

If filing this petition on behalf of an organization, I certify that I am authorized to do so by the organization:

- a. I reviewed and provided or authorized all of the responses and information in my petition;
- b. I understood all of the responses and information contained in, and submitted with, my petition; and
- c. All of the responses and information were complete, true, and correct at the time of filing

Furthermore, I authorize the release of any information from any and all of my records as authorized signatory and the petitioner's records that USCIS may need to determine the petitioner's eligibility for an immigration request and to other entities and persons where necessary for the administration and enforcement of U.S. immigration law.

- 6.a. Petitioner's or Authorized Signatory's Signature
Antonio Donatti
- 6.b. Date of Signature (mm/dd/yyyy) **05/04/2026**

Part 9. Interpreter's Contact Information, Certification, and Signature

Interpreter's Full Name

- 1.a. Interpreter's Family Name (Last Name)
N/A
- 1.b. Interpreter's Given Name (First Name)
N/A
2. Interpreter's Business or Organization Name
N/A

Interpreter's Contact Information

3. Interpreter's Daytime Telephone Number
N/A
4. Interpreter's Mobile Telephone Number (if any)
N/A
5. Interpreter's Email Address (if any)
N/A

Interpreter's Certification and Signature

I certify, under penalty of perjury, that I am fluent in English

and **N/A**.

and I have interpreted every question on the petition and Instructions and interpreted the petitioner's or authorized signatory's answers to the questions in that language, and the petitioner or authorized signatory informed me that they understood every instruction, question, and answer on the petition.

- 6.a. Interpreter's Signature
N/A
- 6.b. Date of Signature (mm/dd/yyyy) **N/A**



Part 10. Contact Information, Certification, and Signature of the Person Preparing this Petition, if Other Than the Petitioner or Authorized Signatory

Preparer's Full Name

1. Preparer's Family Name (Last Name)

HAVERROTH SILVA

Preparer's Given Name (First Name)

Otávio

2. Preparer's Business or Organization Name

HS Law Corp

Preparer's Contact Information

3. Preparer's Daytime Telephone Number

5102419336

4. Preparer's Mobile Telephone Number (if any)

5102419336

5. Preparer's Email Address (if any)

otavio@legalhs.com

Preparer's Certification and Signature

I certify, under penalty of perjury, that I prepared this petition for the petitioner or authorized signatory at their request and with express consent and that all of the responses and information contained in and submitted with the petition are complete, true, and correct and reflects only information provided by the petitioner or authorized signatory. The petitioner or authorized signatory reviewed the responses and information and informed me that they understand the responses and information in or submitted with the petition.

6. Preparer's Signature



Date of Signature (mm/dd/yyyy)

05/04/2026



Part 11. Additional Information

If you need extra space to provide any additional information within this petition, use the space below. If you need more space than what is provided, you may make copies of this page to complete and file with this petition or attach a separate sheet of paper. Type or print your name and A-Number (if any) at the top of each sheet; indicate the **Page Number**, **Part Number**, and **Item Number** to which your answer refers; and sign and date each sheet.

1. Family Name (Last Name) **DE AZEVEDO DONATTI**
Given Name (First Name) **Antonio**
Middle Name **N/A**

2. IRS EIN **N/A**

Page Number	Part Number	Item Number
4	6	3

Leads company growth and product strategy, guiding platform development to meet market needs. Oversees teams for efficient execution, manages partnerships and client engagements, and supports business development. Ensures compliance and oversees budgeting and resource allocation for sustainable operations.

Page Number	Part Number	Item Number
N/A	N/A	N/A

N/A

Page Number	Part Number	Item Number
N/A	N/A	N/A

N/A

Page Number	Part Number	Item Number
N/A	N/A	N/A

N/A

Page Number	Part Number	Item Number
N/A	N/A	N/A

N/A



Application for Permanent Employment Certification
Form ETA-9089 – Final Determination: Permanent Employment Certification Approval
U.S. Department of Labor



PERMANENT EMPLOYMENT CERTIFICATION APPROVAL

A. U.S. Government Agency Use Only

Pursuant to the provisions of Sections 212(a)(5)(A) of the Immigration and Nationality Act, as amended, the Department hereby certifies that there are not sufficient workers who are able, willing, and qualified, and who will be available at the time of application for a visa and admission into the United States and place needed to fill the job opportunities for which certification is sought, and the permanent employment of the foreign worker will not adversely affect the wages and working conditions of workers in the United States similarly employed.

Therefore, by virtue of the signature below, the Department hereby acknowledges granting certification for the following *Application for Permanent Employment Certification* (Form ETA-9089):

1. DOL Case Number		2. Case Status	
3. Employer Legal Business Name		4. Employer FEIN	
5. Foreign Worker's Last (family) Name			
6. Foreign Worker's First (given) Name			
7. Foreign Worker's Middle Name(s)			
8. Job Title			
9. SOC Code		10. SOC Occupational Title	
Labor Certification Validity Information			
11. Filing Date		12. Determination Date	
		13. Expiration Date	
14. Department of Labor Office of Foreign Labor Certification (electronic signature)			

Pursuant to 20 CFR 656, the aforementioned permanent labor certification is valid only for the job opportunity, the foreign worker, and the area of intended employment specified on the approved Form ETA-9089, including all appendices and any modifications approved by the Department. The aforementioned filing date on this approved *Application for Permanent Employment Certification*, established under 20 CFR 656.17(c), may be used as a priority date by the Department of Homeland Security and the Department of State, as appropriate. This approved *Application for Permanent Employment Certification* will expire if not filed in support of *Immigrant Petition for Alien Workers* (Form I-140) with the Department of Homeland Security by the aforementioned expiration date.

The foreign worker covered by this approved *Application for Permanent Employment Certification* has declared under Section B below, under penalty of perjury, that the foreign worker has read and reviewed every page of Appendix A for this approved Form ETA-9089, takes full responsibility for the accuracy of all information contained therein, and intends to accept permanent employment in the job opportunity specified on the approved Form ETA-9089, including all appendices, offered by the employer if granted a visa or an adjustment of status based on this permanent labor certification.

The employer covered by this approved *Application for Permanent Employment Certification* has declared under Section D below under penalty of perjury that it has read and reviewed every page of this approved Form ETA-9089, including all appendices, and takes full responsibility for the accuracy of all information contained therein and all documentation supporting this approved *Application for Permanent Employment Certification*, including any representations made by the employer's authorized preparer, agent or attorney, as applicable.

Application for Permanent Employment Certification
Form ETA-9089 – Final Determination: Permanent Labor Certification Approval
U.S. Department of Labor



B. Foreign Worker Declaration

I **declare** under penalty of perjury that I have read and reviewed all information contained in Appendix A of this approved Form ETA-9089, and that to the best of my knowledge the information contained therein is true and accurate. *I understand that to knowingly and/or willfully furnish materially false information in the preparation of this form and any supplement thereto or to aid, abet, or counsel another to do so is a federal offense punishable by fines, imprisonment, or both (18 U.S.C. 2, 1001, 1546, 1621).*

I **further declare** that I am the person identified under Section A, Fields 5, 6, and 7 above. I did not participate in any activities involving the interviewing or consideration of U.S. workers and intend to accept permanent employment in the job opportunity specified on this approved Form ETA-9089, including all appendices, offered by the employer if granted a visa or an adjustment of status based on this permanent labor certification.

1. Signature * <i>Antonio Donatti</i>	2. Date Signed * 05/04/2026
--	---------------------------------------

C. Attorney or Agent Declaration

I **declare** under penalty of perjury that I am an attorney for the employer, or that I am an employee of, or hired by, the employer listed in Section C of the Form ETA-9089, and that I have been designated by that employer in accordance with 20 CFR 656.10(b) to act on its behalf in connection with this application.

I **hereby certify** that I have provided to the employer the entire Form ETA-9089, appendices, and all supporting documentation for review and to the best of my knowledge the information contained herein is true and accurate, including the employer's declaration regarding activities that I have undertaken on the employer's behalf in connection with this application. *I understand that to knowingly and/or willfully furnish materially false information in the preparation of this form and any supplement hereto or to aid, abet, or counsel another to do so is a federal offense punishable by fines, imprisonment, or both (18 U.S.C. 2, 1001, 1546, 1621).*

1. Attorney or Agent's Last (family) Name * HAVERROTH SILVA	2. First (given) Name * Otavio	3. Middle Initial § N/A
4. Firm/Business Name § HS Law Corp		
5. Signature * <i>[Signature]</i>		6. Date Signed * 05/04/2026

D. Employer Declaration

I **hereby designate** the agent or attorney identified in Section C (if any) of the Form ETA-9089 to represent me for the purpose of labor certification and, by virtue of my signature in Field 5 below, **I take full responsibility** for the accuracy of any representations made by my agent or attorney, and my designated preparer identified in Section C above, on every page of the Form ETA-9089, including all appendices, and documentation supporting this application.

I **declare** under penalty of perjury that I have read and reviewed this application, including every page of the Form ETA-9089, appendices, and supporting documentation, and that to the best of my knowledge the information contained therein is true and accurate. *I understand that to knowingly and/or willfully furnish materially false information in the preparation of this form and any supplement thereto or to aid, abet, or counsel another to do so is a federal offense punishable by fines, imprisonment, or both (18 U.S.C. 2, 1001, 1546, 1621).*

1. Last (family) Name * HAVERROTH SILVA	2. First (given) Name * Otavio	3. Middle Initial § N/A
4. Title * Attorney		
5. Signature * <i>Antonio Donatti</i>		6. Date Signed * 05/04/2026

For Public Burden Statement, see the Instructions for Form ETA-9089.

Application for Permanent Employment Certification
Form ETA-9089 – Appendix A: Foreign Worker Information
U.S. Department of Labor



FOREIGN WORKER INFORMATION

A. Foreign Worker Contact Information

1. Foreign Worker's Last (family) Name *		
DE AZEVEDO DONATTI		
2. Foreign Worker's First (given) Name *		
Antonio		
3. Foreign Worker's Middle Name(s) *		
N/A		
4. Address 1 (current) *		
Tenente Silveira St, 600		
5. Address 2 (apartment/suite/floor and number) §		
Apt 707		
6. City *	7. State *	8. Postal Code *
Florianopolis	Santa Catarina	88010301
9. Country *	10. Province §	
Brazil	Santa Catarina	
11. Date of Birth (mm/dd/yyyy) *	12. Class of Admission *	13. Alien Registration Number (A#) (if applicable) *
12/27/1992	B1/B2	N/A
14. Country of Birth *		
Brazil		
15. Country of Citizenship or Nationality *		
Brazil		

B. Foreign Worker Education §

a. Educational Attainment Information 1

1. Education: U.S. Diploma/Degree attained relevant to the job opportunity	
☐ None ☐ High School/GED ☐ Associate ☐ Bachelor's ☐ Master's ☐ Doctorate (PhD) ☒ Other Degree (JD, MD, etc.)	
1a. If "Other Degree" in question 1, specify the diploma/degree attained	
Executive MBA	
1b. Specify major(s) and/or field(s) of study (may list more than one related major and more than one field)	
Project Management	
1c. Name of Institution that issued the degree/diploma	
Fundacao Getulio Vargas (FGV)	
1d. Name of Country of institution identified in question 1c	1e. Month/year attained (mm/yyyy)
Brazil	08/2023

b. Educational Attainment Information 2

1. Education: U.S. Diploma/Degree attained relevant to the job opportunity	
☐ None ☐ High School/GED ☐ Associate ☒ Bachelor's ☐ Master's ☐ Doctorate (PhD) ☐ Other Degree (JD, MD, etc.)	
1a. If "Other Degree" in question 1, specify the diploma/degree attained	
1b. Specify major(s) and/or field(s) of study (may list more than one related major and more than one field)	
Information Systems	
1c. Name of Institution that issued the degree/diploma	
Federal Univesity of Santa Catarina	
1d. Name of Country of Institution identified in question 1c	1e. Month/year attained (mm/yyyy)
Brazil	03/2018

Application for Permanent Employment Certification
Form ETA-9089 – APPENDIX A: Foreign Worker Information
U.S. Department of Labor



B. Foreign Worker Education (continued)

c. Educational Attainment Information 3

1. Education: U.S. Diploma/Degree attained relevant to the job opportunity ☐ None ☐ High School/GED ☐ Associate ☐ Bachelor's ☐ Master's ☐ Doctorate (PhD) ☐ Other Degree (JD, MD, etc.)	
1a. If "Other Degree" in question 1, specify the diploma/degree attained	
1b. Specify major(s) and/or field(s) of study (may list more than one related major and more than one field)	
1c. Name of Institution that issued the degree/diploma	
1d. Name of Country of Institution identified in question 1c	1e. Month/year attained (mm/yyyy)

d. Educational Attainment Information 4

1. Education: U.S. Diploma/Degree attained relevant to the job opportunity ☐ None ☐ High School/GED ☐ Associate's ☐ Bachelor's ☐ Master's ☐ Doctorate (PhD) ☐ Other Degree (JD, MD, etc.)	
1a. If "Other Degree" in question 1, specify the diploma/degree attained	
1b. Specify major(s) and/or field(s) of study (may list more than one related major and more than one field)	
1c. Name of Institution that issued the degree/diploma	
1d. Name of Country of Institution identified in question 1c	1e. Month/year attained (mm/yyyy)

e. Educational Attainment Information 5

1. Education: U.S. Diploma/Degree attained relevant to the job opportunity ☐ None ☐ High School/GED ☐ Associate's ☐ Bachelor's ☐ Master's ☐ Doctorate (PhD) ☐ Other Degree (JD, MD, etc.)	
1a. If "Other Degree" in question 1, specify the diploma/degree attained	
1b. Specify major(s) and/or field(s) of study (may list more than one related major and more than one field)	
1c. Name of Institution that issued the degree/diploma	
1d. Name of Country of Institution identified in question 1c	1e. Month/year attained (mm/yyyy)

C. Foreign Worker Training Qualifications §

a. Training, Certification(s), and/or License(s) Information 1

1. Name of Institution/School/Training provider Project Management Institute
1a. Name of training, coursework, experience received Project Management Professional (PMP)

Application for Permanent Employment Certification
Form ETA-9089 – APPENDIX A: Foreign Worker Information
U.S. Department of Labor



1b. Training/Certifications/licenses attained (if applicable) Member ID: 11945835		
1c. Start date of training (mm/yyyy)	1d. End date of training (mm/yyyy)	1e. Month/year awarded (mm/yyyy) 09/2025

b. Training, Certification(s), and/or License(s) Information 2

1. Name of Institution/School/Training provider ScrumAlliance		
1a. Name of training, coursework, experience received Certified Scrum Product Owner		
1b. Training/Certifications/Licenses attained (if applicable)		
1c. Start date of training (mm/yyyy)	1d. End date of training (mm/yyyy)	1e. Month/year awarded (mm/yyyy) 05/2025

c. Training, Certification(s), and/or License(s) Information 3

1. Name of Institution/School/Training provider		
1a. Name of training, coursework, experience received		
1b. Training/certifications/licenses attained (if applicable)		
1c. Start date of training (mm/yyyy)	1d. End date of training (mm/yyyy)	1e. Month/year awarded (mm/yyyy)

D. Foreign Worker Training Qualifications §

a. Skills, Abilities, and Proficiencies 1

1. Name of Employer/Institution/School/Training Provider	
1a. Country	1b. State, Territory, or Province
1c. Description of specific skills, abilities, and/or proficiencies the foreign worker possesses or attained, which help establish whether the foreign worker meets the requirements identified for the job opportunity (up to 1,500 characters)	

1. Name of Employer/Institution/School/Training Provider	
1a. Country	1b. State, Territory, or Province
1c. Description of specific skills, abilities, and/or proficiencies the foreign worker possesses or attained, which help establish whether the foreign worker meets the requirements identified for the job opportunity (<i>up to 1,500 characters</i>) 	

1. Employer Name EMS Ventura Ltda			
1a. Address 1 Conselheiro Mafra St, 758			
1b. Address 2 N/A			
1c. City or Town Florianopolis			1d. Postal Code 88010102
1e. Country Brazil		1f. State, Territory, or Province Santa Catarina	
1g. Job Title Delivery Manager			
1h. Start Date (mm/yyyy) 05/2021	1i. End Date (mm/yyyy) Current	1j. Present ☒ Yes ☐ No	1k. Hours Worked Per Week 40

Application for Permanent Employment Certification
Form ETA-9089 – APPENDIX A: Foreign Worker Information
U.S. Department of Labor



11. Job Duties: Specify details of the job (work tasks performed, use of tools/equipment, supervision, etc.) (*up to 3,500 characters*)

Product Management: Led the definition of product roadmap and backlog in collaboration with stakeholders, ensuring alignment with strategic business goals.

Delivery Governance: Facilitated agile ceremonies (planning, reviews, retrospectives) to ensure predictability, continuous improvement, and team alignment.

Performance Monitoring: Tracked key delivery metrics (velocity, quality, team engagement, budget control) to ensure sustainable, high-quality results.

Team Leadership: Managed multidisciplinary teams (UX, Development, QA, PM), allocating professionals based on skill set, availability, and growth plans.

Onboarding & Engagement: Supported the onboarding of new consultants and promoted team engagement initiatives to maintain high morale and cohesion.

Stakeholder Management: Acted as the main point of contact for clients alongside the Customer Success Partner, ensuring transparent communication and risk management.

Commercial Opportunities: Identified upselling and cross-selling opportunities based on pain points and delivery insights, contributing to account growth.

For Public Burden Statement, see the Instructions for Form ETA-9089.

Application for Permanent Employment Certification
Form ETA-9089 – Appendix C: Supplemental Information
U.S. Department of Labor



SUPPLEMENTAL INFORMATION

A. Supplemental Information 1 §

1. Section and Item Number	E	1a. Section Name or Category of Supplemental Information	Foreign Worker Work Experience
1b. Supplemental Information. (up to 1,500 characters)			
Work Experience Employer name: EMS Ventura Ltda Employer Address: Conselheiro Mafra St, 758. Florianopolis - Santa Catarina/Brazil 88010102 Job title: Project Manager Start date - End date: 05/2018 - 05/2021 Job duties: Managing multiple software and product development projects for the healthcare sector, with high-impact deliverables. Leading integration projects with ERPs like TOTVS, SAP, MV, and Benner, using APIs, webhooks, JSON/XML, ensuring traceability and compliance with ANS regulations. Coordinating the migration of infrastructure to cloud environments (AWS, Google Cloud), including buckets, IAM, Docker, and monitoring tools like Zabbix and Grafana. Leading agile squads in a regulated environment, with complete Scrum rituals and KPIs like lead time, rework, and throughput. Developing and launching innovative HealthTech solutions for OPME traceability, technovigilance, dashboards, and automation for health operators and hospitals. Negotiating demands and creating a customization billing model, resulting in a 13% revenue increase and a 32% reduction in unproductive demands. Facilitating internal training, and spreading the agile culture throughout the organization, focusing on autonomy, continuous improvement, and accountability.			

B. Supplemental Information 2 §

1. Section and Item Number	E	1a. Section Name or Category of Supplemental Information	Foreign Worker Work Experience
1b. Supplemental Information. (up to 1,500 characters)			
Work Experience Employer name: EMS Ventura Ltda Employer Address: Conselheiro Mafra St, 758. Florianopolis - Santa Catarina/Brazil 88010102 Job title: Project Coordinator Start date - End date: 12/2017 - 05/2018 Job duties: Planning and monitoring agile cycles (Sprints), prioritizing technical backlogs, and defining releases in an accelerated pace. Launching innovative products in a dynamic, fast-paced environment, working with a startup mentality. Constant reassessment and adaptation of scope and priorities based on feedback from the market, clients, and regulatory compliance. Leading multidisciplinary squads and providing direct support to strategic goal-setting with the executive team. Structuring agile rituals adapted to the regulatory reality of the healthcare sector. Improving internal processes and communication with internal and external stakeholders. Creating executive reports with productivity, quality, and performance metrics.			

For Public Burden Statement, see the Instructions for Form ETA-9089.

Application for Permanent Employment Certification
Form ETA-9089 – Appendix C: Supplemental Information
U.S. Department of Labor



SUPPLEMENTAL INFORMATION

A. Supplemental Information 1 §

1. Section and Item Number	E	1a. Section Name or Category of Supplemental Information	Foreign Worker Work Experience
1b. Supplemental Information. (up to 1,500 characters)			
Work Experience Employer name: Laboratorio Bridge Employer Address: Lauro Linhares St, 2055. Room 902. Florianopolis - Santa Catarina Brazil, 88036003 Job title: System Analyst Start date - End date: 05/2015 - 12/2017 Job duties: Acted as Product Owner in strategic projects for the Ministry of Health (SUS), focusing on interoperability and national impact. Led workshops, meetings, and interviews with technical and clinical stakeholders to gather and prioritize requirements. Translated regulatory requirements into a technical backlog for agile squads. Contributed to the creation and leadership of the first agile cell in the lab, applying modern management practices. Produced functional and technical documentation for development, QA, and approval. Directly communicated with the Ministry of Health, promoting high-value public sector deliveries. Supported scope definition, evaluation of deliverables, and agile process improvement.			

B. Supplemental Information 2 §

1. Section and Item Number	E	1a. Section Name or Category of Supplemental Information	Foreign Worker Work Experience
1b. Supplemental Information. (up to 1,500 characters)			
Work Experience Employer name: Laboratorio Bridge Employer Address: Lauro Linhares St, 2055. Room 902. Florianopolis - Santa Catarina Brazil, 88036003 Job title: Software Tester Start date - End date: 03/2014 - 04/2015 Job duties: Designed and executed test cases to validate software functionality and requirements. Identified, documented, and tracked defects using bug-tracking tools. Performed functional, regression, and integration testing to ensure product quality. Collaborated with developers to reproduce issues and verify fixes. Maintained test documentation and reported testing results. Participated in Agile development processes and release validation.			

For Public Burden Statement, see the Instructions for Form ETA-9089.

Application for Permanent Employment Certification
Form ETA-9089 – Appendix C: Supplemental Information
U.S. Department of Labor



SUPPLEMENTAL INFORMATION

A. Supplemental Information 1 §

1. Section and Item Number	E	1a. Section Name or Category of Supplemental Information	Foreign Worker Work Experience
1b. Supplemental Information. (up to 1,500 characters)			
Work Experience Employer name: Dígitro Tecnologia Employer Address: Alvaro Tolentino St, 1680. Florianopolis - Santa Catarina/Brazil 88080170 Job title: Software Tester Start date - End date: 10/2012 - 02/2014 Job duties: Executed functional testing and validated mission-critical software in a highly technical telecommunications environment Developed test scripts based on requirements specifications and industry quality standards for regulated software Documented and tracked bugs with focus on stability and security, ensuring production-readiness of critical systems Participated in cross-functional alignment meetings with development and QA teams to resolve defects efficiently Supported version approvals and production environment testing, reducing post-release incident rates Provided technical support to squads in investigating and resolving field incidents, contributing to customer satisfaction improvements			

B. Supplemental Information 2 §

1. Section and Item Number		1a. Section Name or Category of Supplemental Information	
1b. Supplemental Information. (up to 1,500 characters)			

For Public Burden Statement, see the Instructions for Form ETA-9089.

SUMMARY OF COVER LETTER

Petitioner: DONATTI, Antonio de Azevedo

Type of Petition: I-140, EB-2 National Interest Waiver

Classification Sought: Immigration and Nationality Act 203(b)(2)(B)

This petition is submitted on behalf of Mr. Antonio de Azevedo Donatti, a technology and project management professional with a STEM academic background in Information Systems, graduate-level study in Business Administration with emphasis in Project Management, PMP® and CSPO® certifications, PMI membership, and over twelve years of progressive experience in HealthTech, SaaS platforms, healthcare systems implementation, AI-enabled automation, ERP integrations, cloud modernization, OPME traceability, and service delivery management.

Mr. Donatti is eligible for the EB-2 classification as a member of the professions holding and advanced degree. He has obtained the equivalent to a U.S. Bachelor of Science in Information Systems plus over 5 years of progressive experience in his field. In addition, Mr. Donatti seeks classification under the National Interest Waiver pursuant to *Matter of Dhanasar*, 26 I&N Dec. 884 (AAO 2016), based on his proposed endeavor to establish and lead IntellexIA Health Technologies, a Naples, Florida-based company. Through this enterprise, he will develop and deploy AI-enabled SaaS solutions for healthcare organizations across the United States, and the proposed endeavor will be executed directly through the operations and growth of this company.

Moreover, Mr. Donatti's proposed endeavor satisfy the 3-prong test under *Dhanasar*:

Substantial Merit and National Importance: The proposed endeavor supports healthcare operational modernization through AI-enabled automation, interoperability, data integration, cost visibility, compliance support, traceability, and data-driven decision-making. It addresses recurring challenges in the U.S. healthcare sector and aligns with federal priorities related to artificial intelligence, healthcare data modernization, interoperability, and healthcare price transparency.

Well-Positioned to Advance the Proposed Endeavor: Mr. Donatti is well-positioned based on his Information Systems background, project management training, PMP® and CSPO® certifications, PMI membership, AI-related training, progressive HealthTech/SaaS experience, measurable prior results, third-party support letters, financial documentation, and structured Business Plan.

Balancing of Benefits to the United States: As founder and leader of IntellexIA Health Technologies, Mr. Donatti will advance an independent, scalable, technology-driven initiative designed to serve multiple healthcare organizations rather than a single employer. Labor certification would not adequately capture the broader value of his proposed work, including healthcare SaaS development, automation, data integration, pricing intelligence, compliance support, job creation, and economic activity.

Considering these factors, Mr. Donatti is eligible to the EB-2 classification and also satisfies the requirements for a National Interest Waiver benefit. We respectfully request a review of his petition and supporting documentation.

Thank you for your attention to this matter.
Sincerely,



Otavio Haverroth Silva
California Bar # 343486

April 27, 2026

USCIS Dallas Lockbox
U.S. Postal Service (USPS):
USCIS
Attn: I-140
P.O. Box 660128
Dallas, TX 75266-0128

Ref.: I-140 Immigrant Visa Self-Petition of Mr. Antonio de Azevedo Donatti – Request for National Interest Waiver under the EB-2 Classification

STEM – CIP Series 11 – Computer and Information Sciences and Support Services / Bachelor of Science in Information Systems

Dear Immigration Officer,

Our firm represents Mr. Antonio de Azevedo Donatti (hereinafter “Mr. Donatti”) in his I-140 immigrant visa self-petition under the EB-2 category. We respectfully request his classification as a professional holding an advanced degree, and we seek a waiver of the job offer and labor certification requirements pursuant to a National Interest Waiver (“NIW”), as provided under section 203(b)(2)(B) of the Immigration and Nationality Act and as interpreted by USCIS according to *Matter of Dhanasar*, 26 I&N Dec. 884 (AAO 2016).

Mr. Donatti is a technology-trained professional with a STEM academic background in Information Systems, within the field of Computer and Information Sciences and Support Services.¹ His foreign academic credentials were evaluated as equivalent to a U.S. **Bachelor of Science in Information Systems**, complemented by **one year of graduate study in Business Administration** with emphasis in Project Management. His academic training includes coursework in computer science, programming, database systems, software engineering, computer networks, intelligent systems, data mining, information security, and project management. (*Exhibit B*).

Mr. Donatti’s professional background is consistent with this academic foundation. Throughout his career, he has developed experience at the intersection of information technology, project management, healthcare operations, and data-driven systems implementation. His work includes leading healthcare technology projects involving OPME

¹ U.S. Department of Homeland Security, *DHS STEM Designated Degree Program List* (July 22, 2024), available at: <https://www.ice.gov/sites/default/files/documents/stem-list.pdf>

management, quotation and procurement workflows, operational automation, management dashboards, systems integration, traceability, and cost-control initiatives in regulated healthcare environments. (*Exhibits A, B, and C.II*).

To implement his proposed endeavor, Mr. Donatti will establish and lead **IntellexIA Health Technologies**, a technology company headquartered in **Naples, Florida**, focused on developing and implementing AI-enabled SaaS solutions for the healthcare sector in the United States. The company will focus on automating administrative and operational workflows, supporting patient intake and triage processes, optimizing scheduling, integrating healthcare data, improving interoperability, and providing decision-support tools designed to increase efficiency, reduce administrative burden, and support more transparent and data-driven healthcare operations. (*Exhibit C.I*).

Under the framework established in *Dhanasar*, this petition will demonstrate that:

- **His proposed endeavor has substantial merit and national importance** - it addresses nationally relevant challenges in the U.S. healthcare system, including administrative inefficiencies, fragmented health data, rising healthcare costs, interoperability gaps, and the need for responsible adoption of AI-enabled tools in healthcare operations, consistent with federal priorities concerning artificial intelligence and healthcare data modernization ² – **Section 3.1**;
- **Mr. Donatti is well-positioned to advance the proposed endeavor** based on his STEM academic background in Information Systems, graduate-level study in Business Administration with emphasis in Project Management, professional certifications, and proven record of leading healthcare technology projects that generated measurable operational and financial improvements – **Section 3.2**;
- **On balance, it would be beneficial to the United States to waive the job offer and labor certification requirements**, as this will allow Mr. Donatti to independently develop a healthcare technology platform focused on efficiency, transparency, interoperability, and data-driven decision-making in the U.S. healthcare sector, including objectives aligned with federal healthcare price transparency and data-access initiatives ³ – **Section 3.3**.

The evidence submitted with this petition will demonstrate, by a preponderance of the evidence, that Mr. Donatti's proposed endeavor serves the national interest of the United States and satisfies the the *Dhanasar* prongs for the National Interest Waiver.

² White House, *White House Unveils America's AI Action Plan* (July 23, 2025), available at: <https://www.whitehouse.gov/releases/2025/07/white-house-unveils-americas-ai-action-plan/>

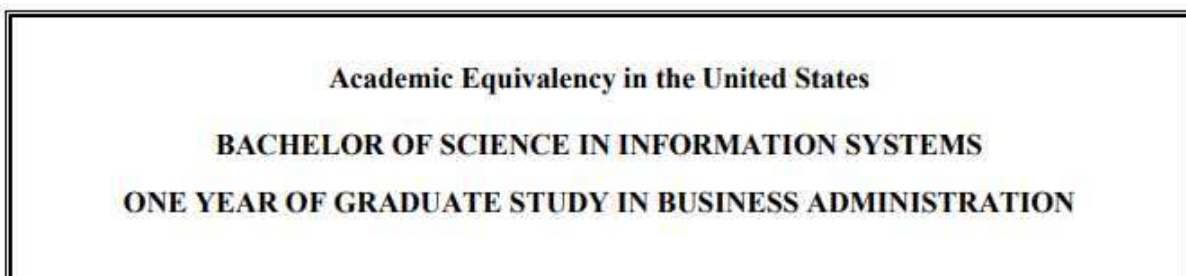
³ White House, *Making America Healthy Again by Empowering Patients with Clear, Accurate, and Actionable Healthcare Pricing Information* (Feb. 25, 2025), available at: <https://www.whitehouse.gov/presidential-actions/2025/02/making-america-healthy-again-by-empowering-patients-with-clear-accurate-and-actionable-healthcare-pricing-information/>

1. THE EB-2 CLASSIFICATION

1.1. ADVANCED DEGREE

To qualify as a professional with advanced training in the EB-2 category, the petitioner must demonstrate possession of an advanced degree, or, alternatively, a foreign bachelor's degree equivalent to a **U.S. bachelor's degree combined with at least five years of progressive post-baccalaureate professional experience**.

Mr. Donatti satisfies this requirement through his foreign academic credentials, which were evaluated as equivalent to a U.S. **Bachelor of Science in Information Systems**, complemented by **one year of graduate study in Business Administration**, and through his progressive professional experience in information technology, project management, digital products, and healthcare-related technology solutions. (Exhibit B).



Mr. Donatti's academic credentials were evaluated by Carnegie Evaluations LLC, which concluded that his education in Brazil **is equivalent in the United States to a Bachelor of Science in Information Systems** and one year of graduate study in Business Administration. **This evaluation confirms the validity** and relevance of his academic background for purposes of the EB-2 classification, **particularly when considered together with his progressive professional experience after completion of his bachelor's degree**. (Exhibit B).

In addition to the academic equivalency itself, Mr. Donatti's education is technical and technology-based in nature. His Bachelor's degree in Information Systems included coursework directly related to computer science, programming, database systems, software engineering, computer networks, intelligent systems, data mining, information security, and project management. This academic foundation is directly relevant to his work with digital systems, data integration, operational automation, and AI-enabled technology solutions. (Exhibit B).

In addition to his formal academic credentials, Mr. Donatti has accumulated progressive professional experience after completion of his bachelor's degree, working in technology projects, product management, and systems implementation for the healthcare sector.

Attached are his resume and supporting documentation (Exhibits A and B), summarized below:

- From October 2012 to February 2014 – Software Tester, Dígitro Tecnologia: Mr. Donatti executed functional testing and validated mission-critical software in a highly technical telecommunications environment. His responsibilities included developing test scripts based on requirements specifications and quality standards, documenting and tracking software defects, supporting version approvals, and assisting technical teams in resolving field incidents. This early role helped establish his foundation in software quality, systems validation, technical documentation, and production-readiness of critical systems.
- From March 2014 to April 2015 – Software Tester, Laboratório Bridge: Mr. Donatti performed manual and automated software testing for complex national-impact systems, creating test plans, regression testing scenarios, and automated validation flows using Selenium. His work supported quality assurance in Agile environments and contributed to improved software reliability, test coverage, and delivery predictability.
- From May 2015 to December 2017 – Systems Analyst, Laboratório Bridge: Mr. Donatti acted as Product Owner on strategic projects for the Ministry of Health (SUS), supporting interoperability and national-scale public healthcare systems. His responsibilities included leading stakeholder workshops, gathering and prioritizing requirements with technical and clinical teams, translating regulatory requirements into actionable backlogs, preparing technical and functional documentation, and maintaining direct communication with the Ministry of Health to ensure that public-sector deliveries met policy and technical standards.
- **From December 2017 to May 2018** – Project **Coordinator**, EMS Ventura Ltda.: Mr. Donatti planned and monitored Agile sprint cycles, prioritized technical backlogs, defined release schedules, and supported the launch of healthcare products under regulatory constraints. He also led multidisciplinary squads, supported executive leadership on strategic goals and resource allocation, created performance reports, and improved internal processes and communication channels between technical teams and business stakeholders.
- **From May 2018 to May 2021** – Project **Manager**, EMS Ventura Ltda.: Mr. Donatti managed multiple concurrent software development and product delivery projects for the healthcare sector. His work included leading ERP integration projects with TOTVS, SAP, MV, and Benner through APIs, webhooks, and JSON/XML, supporting traceability and compliance with ANS regulations, directing cloud infrastructure migration involving AWS and Google Cloud, and developing HealthTech solutions involving AI, OPME traceability, technovigilance, and automation for health operators and hospitals. He also negotiated a customized billing model that contributed to 13% revenue growth and a 32% reduction in unproductive demands.
- **From May 2021 to the present** – Service Delivery **Manager**, EMS Ventura Ltda.: Mr. Donatti leads service delivery governance and quality management across multiple HealthTech SaaS platforms, ensuring compliance in regulated healthcare environments. His responsibilities include defining quality gates, acceptance criteria, and testing standards within Agile squads, coordinating QA strategy across manual and automated testing, monitoring performance through KPIs and quality dashboards, managing

escalation of quality risks and production incidents, and aligning delivery cadence with product roadmaps and business priorities.

Thus, Mr. Donatti has demonstrated more than five years of progressive post-baccalaureate experience in information technology, healthcare systems, project management, product implementation, and data-driven operational improvement. His career progression from software testing and systems analysis to project coordination, project management, and service delivery leadership confirms increasing levels of responsibility and technical-managerial expertise.

Under 8 C.F.R. § 204.5(k)(3)(i)(B), a beneficiary can satisfy the advanced degree requirement by holding either a:

- U.S. master's degree or higher, or a foreign degree evaluated to be the equivalent of a U.S. master's degree or higher; or
- U.S. bachelor's degree, or foreign degree evaluated to be the equivalent of a U.S. bachelor's degree, plus five years of progressive, post-degree work experience.

Mr. Donatti meets the advanced degree requirement, as set forth under Section 203(b)(2) of the Immigration and Nationality Act (INA) and 8 C.F.R. § 204.5(k)(3)(i)(B), through his foreign academic credential equivalent to a U.S. **Bachelor of Science in Information Systems**, combined with more than five years of progressive professional experience following completion of his degree in positions of increasing responsibility within information technology, healthcare systems implementation, project management, product delivery, and HealthTech SaaS operations.

Although eligibility for the EB-2 category requires meeting either the advanced degree criterion or the exceptional ability criterion, this petition is primarily based on Mr. Donatti's qualifications as a professional holding an advanced degree. Alternatively, the evidence also demonstrates that his academic background, professional certifications, progressive experience, and documented record of successful technology implementation further confirm his eligibility for the EB-2 classification.

2. THE PROPOSED ENDEAVOR

Mr. Donatti proposes to establish and lead IntellexIA Health Technologies, a technology company headquartered in Naples, Florida, focused on developing and implementing AI-enabled SaaS solutions for the healthcare sector in the United States. As described in the Business Plan, the company will be structured to serve healthcare providers, clinics, medical groups, ambulatory surgical centers, and healthcare organizations facing operational challenges related to automation, data integration, interoperability, procurement, compliance, scheduling, triage, traceability, and data-driven decision-making. (Exhibit C.I).

Through this initiative, Mr. Donatti will apply his background in Information Systems, project management, digital product implementation, and healthcare operations to develop technology

solutions that reduce manual processes, improve coordination between teams and systems, and support greater administrative efficiency in regulated healthcare environments. The proposed endeavor is not limited to the creation of a single software tool, but rather to the development of a scalable SaaS platform and operational model that can be implemented across different healthcare organizations according to their technical, operational, and regulatory needs.

Operationally, IntellexIA Health Technologies will provide services focused on AI-enabled healthcare workflow automation, healthcare data integration, interoperability support, procurement and OPME traceability tools, pricing intelligence, compliance and audit automation, analytics dashboards, SaaS implementation, product delivery, and process modernization consulting for healthcare organizations. These services will be designed to reduce repetitive administrative work, improve information flow, support operational visibility, strengthen compliance, and enable data-driven decision-making across healthcare providers. (Exhibit C.I).

The company will initially focus on small to mid-sized hospitals, outpatient surgical centers, and specialty clinics, as these healthcare segments present a combination of high need, faster adoption cycles, and lower barriers to entry. As the company scales its platform and expands its operational capacity, it will progressively target larger hospital systems, integrated delivery networks, and payer organizations, enabling broader operational impact and increased revenue potential. (Exhibit C.I).

The company will operate from Naples, Florida, a region selected in the Business Plan because of its strong healthcare infrastructure, concentration of medical service providers, and growing demand for advanced healthcare management and technology solutions. Naples and the broader Southwest Florida region present favorable healthcare demand drivers, including a high concentration of elderly residents, sustained demand for surgical procedures and chronic care management, and the presence of hospitals, ambulatory surgical centers, and specialty clinics that may benefit from improved procurement, compliance, and operational coordination systems. (Exhibit C.I).

The core value of the proposed endeavor lies in developing a centralized SaaS platform designed to standardize healthcare data, improve regulatory compliance, enhance pricing transparency, and integrate procurement workflows. By focusing on cost-sensitive areas of healthcare operations, including medical device procurement and operational traceability, IntellexIA Health Technologies is positioned to provide measurable value through cost reduction, operational efficiency, improved governance, and better data visibility. (Exhibit C.I).

This approach is consistent with Mr. Donatti's professional trajectory. Throughout his career, he has worked on projects involving systems implementation, dashboards, process automation, traceability, OPME management, quotation and procurement workflows, technovigilance, ERP integrations, cloud modernization, quality management, and cost-control initiatives in healthcare environments. This practical experience provides a direct foundation for his ability

to develop and lead IntellexIA Health Technologies in the United States. (Exhibits A, B, and C.II).

The Business Plan further demonstrates that IntellexIA Health Technologies has been structured for scalable and sustainable growth. The company's service portfolio is expected to evolve as the platform matures and adoption increases, including advanced pricing intelligence models, predictive cost analytics, expanded compliance and audit automation capabilities, integration with additional hospital systems, ERPs and billing platforms, enhanced analytics dashboards for multi-facility organizations, and consulting services for procurement optimization and system integration. (Exhibit C.I).

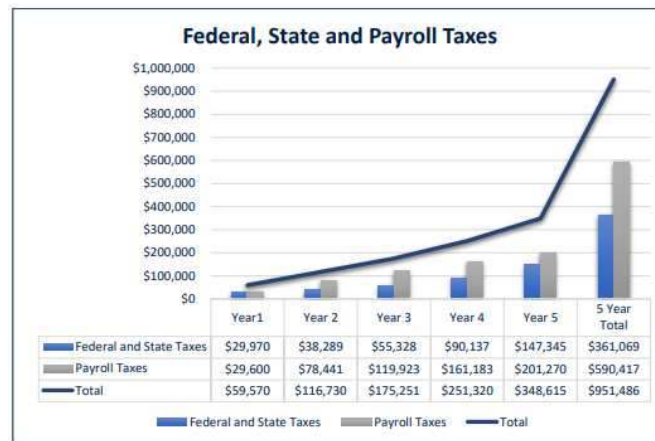
Following its initial operations in Florida, the company plans geographic expansion into additional healthcare markets, including statewide expansion in Florida, Texas markets such as Houston, Dallas, and Austin, the Southeast United States, including Georgia and North Carolina, and other metropolitan healthcare hubs. This structured expansion strategy demonstrates that the proposed endeavor is designed to move beyond a local operation and develop into a scalable healthcare technology platform with broader U.S. market relevance. (Exhibit C.I).

IntellexIA Health Technologies will be supported by an initial capitalization plan of approximately \$70,000. This amount includes approximately \$35,000 allocated to startup expenses, such as business formation, regulatory and compliance consulting, cloud infrastructure, software tools, licenses, and testing environments. The remaining funds will support initial cash requirements and working capital for early operations, product deployment, market validation, and client acquisition. This structure is consistent with the Business Plan's financial projections and supports the company's initial operational readiness. (Exhibit C.I).

The company's financial projections further support the feasibility and scalability of the proposed endeavor. According to the Business Plan, sales are projected to grow from \$515,000 in Year 1 to \$3,103,187 in Year 5. Gross margin is projected to increase from \$473,800 in Year 1 to \$2,854,932 in Year 5, while net profit is expected to rise from \$81,030 in Year 1 to \$398,377 in Year 5. These projections reflect a scalable SaaS-based model supported by recurring revenue, controlled cost growth, and expanding adoption of the company's technology solutions. (Exhibit C.I).



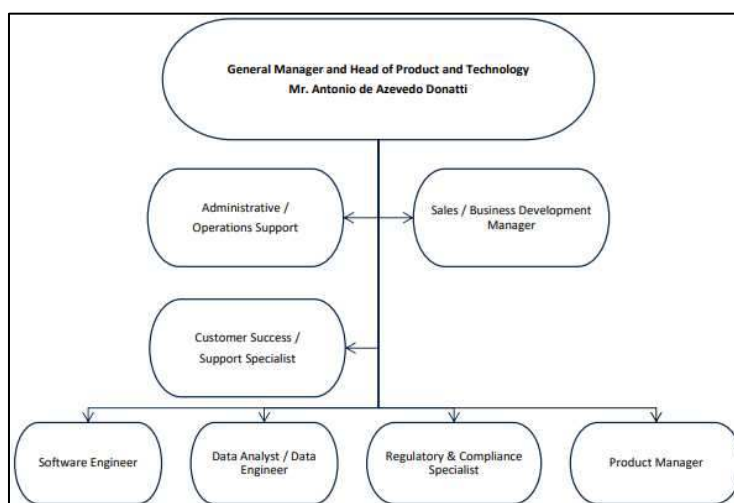
The company is also projected to generate meaningful tax contributions during its first five years of operation. The Business Plan estimates federal and state taxes totaling \$361,069 over five years, payroll taxes totaling \$590,417, and combined federal, state, and payroll tax contributions of \$951,486. These projections further demonstrate that the proposed endeavor has planned economic contributions beyond its direct client services. (Exhibit C.I).



The cash flow projections also show a financially sustainable operating model. Total cash inflow is projected to increase from \$515,000 in Year 1 to \$3,103,187 in Year 5, while net cash flow remains positive throughout the projection period, increasing from \$70,362 in Year 1 to \$319,812 in Year 5. The company's projected cash balance is expected to grow from \$105,362 in Year 1 to \$813,494 by Year 5, demonstrating liquidity, operational stability, and capacity to reinvest in growth. (Exhibit C.I).

The Business Plan also provides for phased job creation aligned with the company's operational growth. IntellexIA Health Technologies is expected to begin with a lean technical and managerial structure and gradually expand its workforce as the platform gains market adoption. The hiring plan includes roles related to engineering, data, compliance, customer success, sales, product development, analytics, operations, and administrative support, allowing the company to build internal capacity for product development, implementation, client onboarding, ongoing support, and platform optimization. This staged hiring strategy reinforces that the proposed endeavor is designed as a scalable healthcare technology company, rather than a limited individual consulting activity by Mr. Donatti. (Exhibit C.I).

Personnel Plan					
	Year 1	Year 2	Year 3	Year 4	Year 5
General Manager and Head of Product and Technology - Mr. Antonio de Azevedo Donatti	1	1	1	1	1
Software Engineer	0	1	1	2	2
Data Analyst / Data Engineer	1	1	2	3	3
Regulatory & Compliance Specialist	0	1	2	2	2
Product Manager	0	1	1	1	2
Customer Success / Support Specialist	0	1	2	2	3
Sales / Business Development Manager	1	1	2	3	4
Administrative / Operations Support	1	1	1	1	1
Total People	4	8	12	15	18



In summary, the proposed endeavor will address relevant operational needs in the U.S. healthcare sector related to automation, interoperability, procurement intelligence, compliance, data integration, traceability, administrative efficiency, and data-driven decision-making. The project is directly connected to Mr. Donatti’s academic background in Information Systems, his practical experience in HealthTech/SaaS environments, and the expansion plan described in the Business Plan. Additional details regarding the substantial merit and national importance of the proposed endeavor will be addressed in the following sections, particularly in Section 3.1.

3. NATIONAL INTEREST WAIVER

Framework Under *Matter of Dhanasar*

The national interest waiver provides a pathway for qualified individuals to forgo the labor certification and job offer process when their proposed contributions offer benefits to the United States that extend beyond a conventional employment position. Under section 203(b)(2)(B) of the Immigration and Nationality Act, and pursuant to 8 C.F.R. § 204.5(k)(4)(ii), USCIS may waive these requirements when doing so is determined to be in the national interest.

In *Matter of Dhanasar*, 26 I&N Dec. 884 (AAO 2016), USCIS introduced a three-prong framework for evaluating NIW eligibility. This framework requires that the petitioner demonstrate:

1. The proposed endeavor has both substantial merit and national importance;
2. The individual is well-positioned to advance the proposed endeavor; and
3. On balance, it would be beneficial to the United States to waive the job offer and labor certification requirements.

As will be detailed in the following sections, Mr. Donatti satisfies all three prongs of the Dhanasar framework:

- **The proposed endeavor, through the launch and development of IntellexIA Health Technologies, has substantial merit and national importance** – it addresses significant operational challenges in the U.S. healthcare sector, including administrative inefficiency, fragmented healthcare data, procurement and compliance limitations, interoperability gaps, pricing visibility concerns, and the need for responsible AI-enabled tools capable of supporting healthcare operations at scale. By developing a SaaS platform focused on automation, data integration, traceability, procurement intelligence, analytics, and decision support, the proposed endeavor directly contributes to healthcare efficiency and technology modernization in the United States – Section 3.1;
- **Mr. Donatti is well-positioned to advance this endeavor** based on his STEM academic background in Information Systems, graduate-level study in Business Administration with emphasis in Project Management, PMP® and CSPO® certifications, specialized training in generative AI for project management, and more than twelve years of progressive experience in information technology, HealthTech, SaaS platforms, healthcare systems implementation, ERP integrations, cloud modernization, AI automation, OPME traceability, quality governance, and service delivery management. His record demonstrates both technical understanding and project leadership in healthcare technology environments directly related to the proposed endeavor – Section 3.2;
- **On balance, granting the waiver of the job offer and labor certification requirements is beneficial to the United States** because Mr. Donatti’s proposed endeavor is founder-led, technology-driven, and structured to operate beyond a single employer or isolated consulting engagement. Through IntellexIA Health Technologies, he will be able to independently develop and scale healthcare technology solutions that support efficiency, transparency, interoperability, procurement intelligence, compliance, and data-driven operations across multiple healthcare providers and markets in the United States – Section 3.3.

Accordingly, this petition demonstrates through documentary evidence, expert letters, professional records, certifications, and the attached Business Plan (Exhibit C.I) that Mr. Donatti’s proposed endeavor fully satisfies the Matter of Dhanasar framework and qualifies for a National Interest Waiver.

3.1.First PRONG:

The Proposed Endeavor has Substantial Merit and National Importance

Under *Dhanasar*, the national importance of a proposed endeavor is not determined solely by the geographic location where the work will begin. Rather, USCIS considers the potential prospective impact of the endeavor, including whether it has broader implications within a particular field, whether it has significant potential to employ U.S. workers, whether it may generate positive economic effects, and whether it addresses a matter that government entities have identified as nationally important.

As described in Section 2 and in the Business Plan (Exhibit C.I), IntellexIA Health Technologies is structured as a scalable AI-enabled SaaS company for healthcare operations. This section explains why the proposed endeavor has substantial merit and national importance under the first prong of *Dhanasar*.

The proposed endeavor has substantial merit because it addresses practical and measurable needs in the U.S. healthcare sector. Healthcare organizations frequently face administrative inefficiencies, fragmented data systems, limited interoperability, manual workflows, procurement and compliance challenges, and insufficient visibility into operational and cost-related information. These issues affect healthcare providers' ability to manage resources, coordinate information, control costs, and make reliable operational decisions.

IntellexIA Health Technologies will address these issues through a set of services designed to improve operational efficiency, strengthen traceability, support better use of healthcare data, and reduce administrative burden in regulated healthcare environments. These services include:

- **AI-Enabled Healthcare Workflow Automation:** The company will develop and implement automation tools to reduce repetitive administrative work, improve internal workflow coordination, and support more efficient handling of patient intake, triage, scheduling, documentation, and operational requests.
- **Healthcare Data Integration and Interoperability Support:** The company will support the integration of clinical, administrative, procurement, and operational data across fragmented systems, improving information flow and helping healthcare organizations make more reliable decisions based on consolidated data.
- **Procurement and OPME Traceability Tools:** Drawing from Mr. Donatti's prior experience in healthcare technology projects, the company will provide tools to improve traceability in procurement workflows, approval processes, medical device-related operations, and other cost-sensitive areas where documentation, compliance, and cost control are critical.
- **Pricing Intelligence and Cost Visibility:** IntellexIA Health Technologies will develop data-driven tools to support pricing visibility, cost monitoring, and identification of inefficiencies in healthcare operations, helping providers improve financial and operational control.
- **Compliance and Audit Automation:** The company will support healthcare organizations in standardizing workflows, monitoring operational data, and automating audit-related processes, contributing to better governance and consistency in regulated environments.
- **Analytics Dashboards and Decision-Support Tools:** The company will provide dashboards and reporting tools to support performance monitoring, bottleneck identification, operational planning, and data-driven decision-making by healthcare managers.
- **SaaS Implementation, Product Delivery, and Process Modernization:** IntellexIA Health Technologies will assist healthcare organizations in implementing SaaS-based

platforms, configuring workflows, training users, monitoring adoption, and optimizing processes after deployment.

Together, these services demonstrate the substantial merit of the proposed endeavor because they address concrete operational problems in healthcare, including fragmented systems, manual workflows, limited cost visibility, procurement inefficiencies, compliance challenges, and insufficient data integration. They also support the national importance of the endeavor because they are designed to be configured and deployed across multiple healthcare organizations, allowing the company's model to scale beyond a single employer, facility, or local project. (Exhibit C.I).

The endeavor is also nationally important because it aligns with federal priorities concerning artificial intelligence, healthcare data modernization, interoperability, and healthcare price transparency. The White House has emphasized the importance of maintaining American leadership in artificial intelligence and removing barriers to AI development, while also promoting clearer, more accurate, and actionable healthcare pricing information.^{4 5 6} These priorities are directly relevant to Mr. Donatti's proposed work, which applies AI-enabled tools and data-driven systems to operational challenges in healthcare.

In addition, federal policy has recognized the importance of healthcare data infrastructure and interoperability in the responsible use of AI in health-related contexts. The proposed endeavor is consistent with this direction because it focuses on integrating fragmented healthcare data, improving operational visibility, and supporting scalable implementation of AI-enabled tools in healthcare organizations.⁷

The proposed endeavor is implementation-oriented. It is not limited to research, advisory services, or a single employer-based role. Through IntellexIA Health Technologies, Mr. Donatti will develop and deploy technology solutions across multiple healthcare organizations, allowing the company's tools and implementation model to be configured, replicated, and scaled in different operational settings. This scalability supports the national importance of the endeavor because its potential impact is not confined to one facility, one employer, or one local project.

The economic component of the endeavor further supports its national importance. As summarized in Section 2 and detailed in the Business Plan, IntellexIA Health Technologies is

⁴ White House, *White House Unveils America's AI Action Plan* (July 23, 2025), available at: <https://www.whitehouse.gov/releases/2025/07/white-house-unveils-americas-ai-action-plan/>

⁵ White House, *Removing Barriers to American Leadership in Artificial Intelligence* (Jan. 23, 2025), available at: <https://www.whitehouse.gov/presidential-actions/2025/01/removing-barriers-to-american-leadership-in-artificial-intelligence/>

⁶ White House, *Making America Healthy Again by Empowering Patients with Clear, Accurate, and Actionable Healthcare Pricing Information* (Feb. 25, 2025), available at: <https://www.whitehouse.gov/presidential-actions/2025/02/making-america-healthy-again-by-empowering-patients-with-clear-accurate-and-actionable-healthcare-pricing-information/>

⁷ White House, *Unlocking Cures for Pediatric Cancer with Artificial Intelligence* (Sept. 30, 2025), available at: <https://www.whitehouse.gov/presidential-actions/2025/09/unlocking-cures-for-pediatric-cancer-with-artificial-intelligence/>

projected to grow from \$515,000 in sales in Year 1 to \$3,103,187 in Year 5, while generating positive net profit, tax contributions, and phased job creation in technology development, implementation, compliance, customer success, sales, operations, and administration. (Exhibit C.I). These projections demonstrate that the endeavor has the potential to contribute to the U.S. economy while supporting modernization within the healthcare technology sector.

Accordingly, the proposed endeavor has substantial merit because it addresses concrete healthcare operational problems through technology, automation, data integration, and AI-enabled tools. It has national importance because those problems are connected to broader U.S. priorities involving healthcare efficiency, interoperability, pricing transparency, responsible AI adoption, and economic competitiveness. The first prong of *Dhanasar* is therefore satisfied.

3.1.1. BUSINESS PLAN

A detailed description of the proposed endeavor and why it is of substantial merit:

The proposed endeavor consists of the creation and development of IntellexIA Health Technologies, a technology company headquartered in Naples, Florida, focused on AI-enabled SaaS solutions for healthcare operations. As detailed in the Business Plan, the company will serve healthcare providers, clinics, medical groups, ambulatory surgical centers, and healthcare organizations that need better tools for workflow automation, procurement management, interoperability, compliance monitoring, data integration, operational analytics, and decision support. (Exhibit C.I).

IntellexIA Health Technologies is structured to address operational problems that directly affect the efficiency and cost structure of healthcare organizations. Its services will focus on AI-enabled workflow automation, healthcare data integration, interoperability support, procurement and OPME traceability, pricing intelligence, compliance and audit automation, analytics dashboards, SaaS implementation, product delivery, and process modernization consulting. These services are designed to reduce administrative burden, improve data visibility, strengthen traceability, and support more reliable decision-making in regulated healthcare environments. (Exhibit C.I).

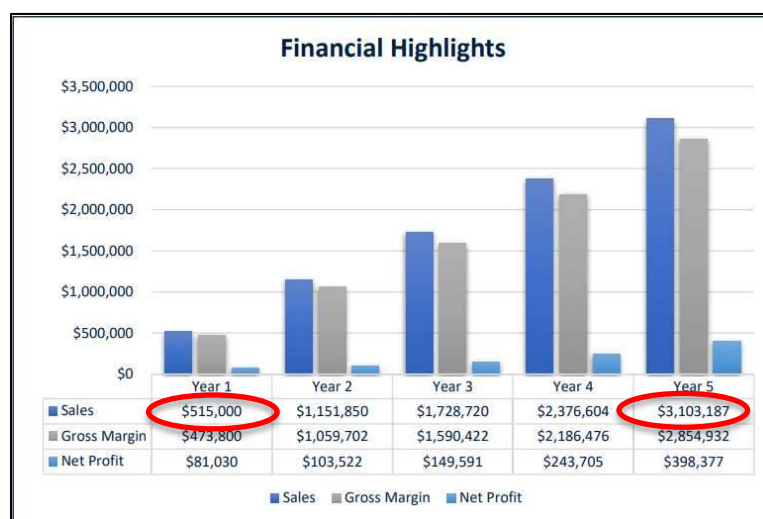
The following points demonstrate both the relevance of the healthcare technology sector to the United States and the expected prospective impact of Mr. Donatti's specific proposed endeavor through IntellexIA Health Technologies:

- **Improving Healthcare Workflow Efficiency:** IntellexIA Health Technologies will help healthcare organizations reduce repetitive administrative work, improve coordination across internal teams, and support more efficient handling of intake, triage, scheduling, documentation, and operational requests.
- **Supporting Data Integration and Interoperability:** The company will develop and implement tools that integrate clinical, administrative, procurement, and operational data across fragmented systems, improving information flow and supporting more reliable decisions based on consolidated data.

- **Enhancing Procurement, OPME Traceability, and Cost Visibility:** The company will provide technology tools for procurement workflows, approval processes, OPME-related operations, pricing intelligence, and cost monitoring in healthcare environments where documentation, compliance, and cost control are critical.
- **Strengthening Compliance and Operational Governance:** IntellexIA Health Technologies will support workflow standardization, compliance and audit automation, quality monitoring, and performance reporting, helping healthcare organizations operate with greater consistency and transparency.
- **Expanding AI-Enabled Operational Decision Support:** The company will apply AI-enabled tools to practical healthcare workflows, including automation, analytics, dashboarding, predictive cost analysis, pricing intelligence, and process optimization.
- **Generating Economic and Workforce Contributions:** Through its planned investment, hiring, technology development, vendor engagement, and service expansion, the company is projected to generate direct and indirect economic activity in the United States. (Exhibit C.I).

The Business Plan demonstrates that IntellexIA Health Technologies has been designed as a scalable business rather than a limited consulting practice. The company's model is based on configurable SaaS solutions, standardized implementation processes, recurring platform optimization, customer support, and phased hiring. This structure enables the company to serve multiple healthcare organizations and expand beyond its initial market in Southwest Florida. (Exhibit C.I).

The Business Plan also supports the feasibility of the endeavor through defined financial projections, market-entry strategy, planned staffing, and projected economic contributions. As summarized in Section 2, **IntellexIA Health Technologies projects sales growth from \$515,000 in Year 1 to \$3,103,187 in Year 5**, positive net profit throughout the projection period, meaningful tax contributions, and phased job creation in technology development, implementation, compliance, customer success, sales, operations, and administration. (Exhibit C.I).



In conclusion, the Business Plan confirms that the proposed endeavor has substantial merit because it addresses real operational needs in the healthcare sector through automation, interoperability, data integration, procurement intelligence, compliance support, cost visibility, and AI-enabled decision-making. It also confirms that the company is structured for scalable growth, economic contribution, and broader implementation across multiple healthcare organizations in the United States.

3.1.2. EVIDENCE OF ENDEAVOR'S MERIT

Healthcare Technology Industry Relevance in the United States:

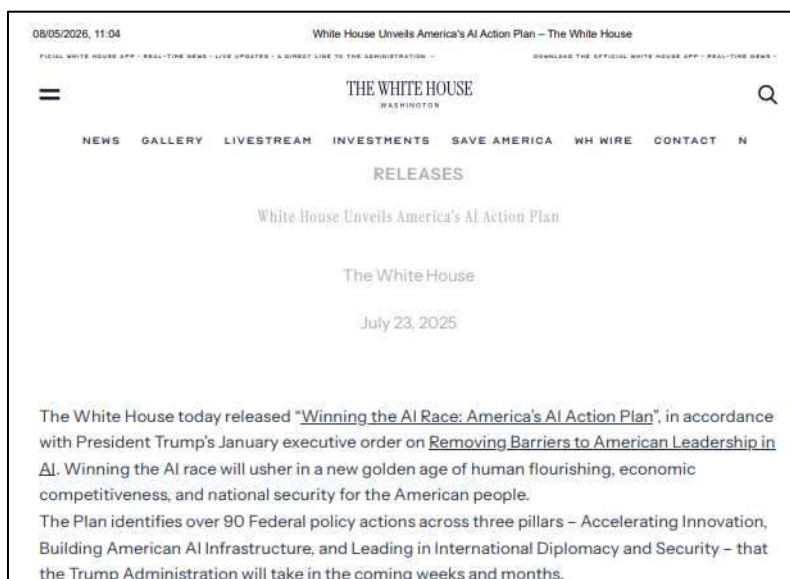
The initiative proposed by Mr. Donatti, through IntellexIA Health Technologies, has clear implications for the U.S. healthcare technology, AI implementation, and healthcare operations sectors. The demand for reliable, interoperable, and data-driven healthcare systems continues to grow as healthcare providers face increasing pressure to reduce administrative burden, improve cost visibility, manage fragmented data, and adopt digital tools that support operational efficiency.

Beyond its immediate commercial impact, the initiative addresses broader structural challenges in healthcare operations. Healthcare organizations increasingly require integrated systems capable of connecting administrative, financial, procurement, scheduling, and clinical-adjacent workflows. When these systems remain fragmented, providers face higher operational costs, reduced visibility, delays in decision-making, and increased compliance burdens. IntellexIA Health Technologies is designed to address these challenges by applying AI-enabled automation, SaaS implementation, analytics, and data integration to operational workflows in healthcare organizations. (Exhibit C.I).

The proposed endeavor also aligns with the United States' broader focus on artificial intelligence as a strategic technological priority. Federal policy materials identify AI as relevant to American innovation, infrastructure, economic competitiveness, and national security. The White House's America's AI Action Plan identifies more than 90 federal policy actions across pillars including accelerating innovation, building American AI infrastructure, and leading in international diplomacy and security. In addition, federal policy states that the United States seeks to sustain and enhance America's global AI leadership to promote economic competitiveness and national security.^{8 9}

⁸ White House, *White House Unveils America's AI Action Plan* (July 23, 2025), available at: <https://www.whitehouse.gov/releases/2025/07/white-house-unveils-americas-ai-action-plan/>

⁹ White House, *Removing Barriers to American Leadership in Artificial Intelligence* (Jan. 23, 2025), available at: <https://www.whitehouse.gov/presidential-actions/2025/01/removing-barriers-to-american-leadership-in-artificial-intelligence/>



In the healthcare context, federal policy also connects AI implementation with healthcare data infrastructure and interoperability. The White House has directed federal action to integrate AI innovation into interoperability efforts, support the use of electronic health record and claims data, and develop standards for structured and unstructured patient data that enable safe and privacy-compliant data exchange.¹⁰ Although Mr. Donatti's endeavor is commercially focused, its operational model is consistent with these broader priorities because it seeks to improve the use, integration, and accessibility of healthcare operational data across organizations.



The project also relates to federal healthcare price transparency priorities. The White House has stated that it is the policy of the United States to promote universal access to clear and accurate healthcare prices, improve existing price transparency requirements, increase enforcement, and empower patients with meaningful price information. Federal policy also calls for disclosure of actual prices, standardized and comparable pricing information, and transparent reporting of complete, accurate, and meaningful data.¹¹ IntellexIA Health

¹⁰ White House, *Unlocking Cures for Pediatric Cancer with Artificial Intelligence* (Sept. 30, 2025), available at: <https://www.whitehouse.gov/presidential-actions/2025/09/unlocking-cures-for-pediatric-cancer-with-artificial-intelligence/>

¹¹ White House, *Making America Healthy Again by Empowering Patients with Clear, Accurate, and Actionable Healthcare Pricing Information* (Feb. 25, 2025), available at: <https://www.whitehouse.gov/presidential->

Technologies' focus on pricing intelligence, procurement visibility, OPME traceability, and cost-sensitive healthcare workflows directly supports the type of operational transparency that healthcare providers need to make better financial and administrative decisions. (Exhibit C.I).



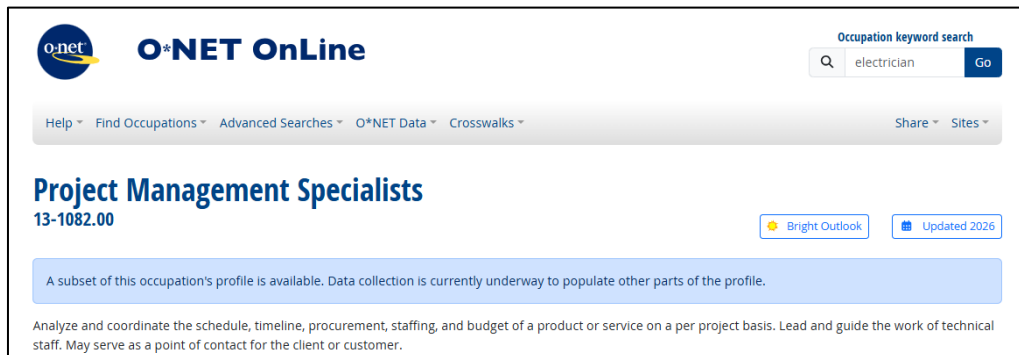
The proposed endeavor also has economic relevance because it operates within a professional and technological environment that requires skilled project leadership, software implementation, data coordination, stakeholder management, and operational transformation. **The U.S. Bureau of Labor Statistics recognizes Project Management Specialists as a large and growing occupational field**, with 1,046,300 jobs in 2024 and projected employment growth to 1,105,000 jobs by 2034, reflecting continued demand for professionals capable of managing complex projects across business and technology environments.¹²

Employment projections data for project management specialists, 2024–34	
Project management specialists	
SOC Code:	13-1082
Employment, 2024:	1,046,300
Projected Employment, 2034:	1,105,000
Change, 2024–34 (Percent):	6
Change, 2024–34 (Numeric):	58,700
Employment By Industry:	Get data
SOURCE: U.S. Bureau of Labor Statistics, Employment Projections program	

[actions/2025/02/making-america-healthy-again-by-empowering-patients-with-clear-accurate-and-actionable-healthcare-pricing-information/](https://www.whitehouse.gov/presidential-actions/2025/02/making-america-healthy-again-by-empowering-patients-with-clear-accurate-and-actionable-healthcare-pricing-information/)

¹² U.S. Bureau of Labor Statistics, *Occupational Outlook Handbook: Project Management Specialists*, available at: <https://www.bls.gov/ooh/business-and-financial/project-management-specialists.htm>

O*NET further confirms that Project Management Specialists perform functions directly relevant to the execution of Mr. Donatti's healthcare technology endeavor, including coordinating schedules, timelines, procurement, staffing, budgets, technical teams, stakeholders, client requirements, and information technology project activities. These functions closely align with IntellexIA Health Technologies' planned operations, which will require healthcare SaaS implementation, workflow automation, data integration, procurement and OPME traceability, compliance coordination, technical delivery, and client-facing support for healthcare organizations.¹³



Together, these considerations demonstrate that the proposed endeavor is not merely a private business initiative with limited local effect. Rather, it is positioned within nationally relevant fields involving healthcare technology, AI adoption, interoperability, pricing visibility, and operational modernization. By developing a scalable platform and implementation model for healthcare organizations, IntellexIA Health Technologies has the potential to contribute to broader improvements in healthcare efficiency, data use, and technology-enabled operations in the United States.

3.1.3. ENDEAVOR'S IMPACT

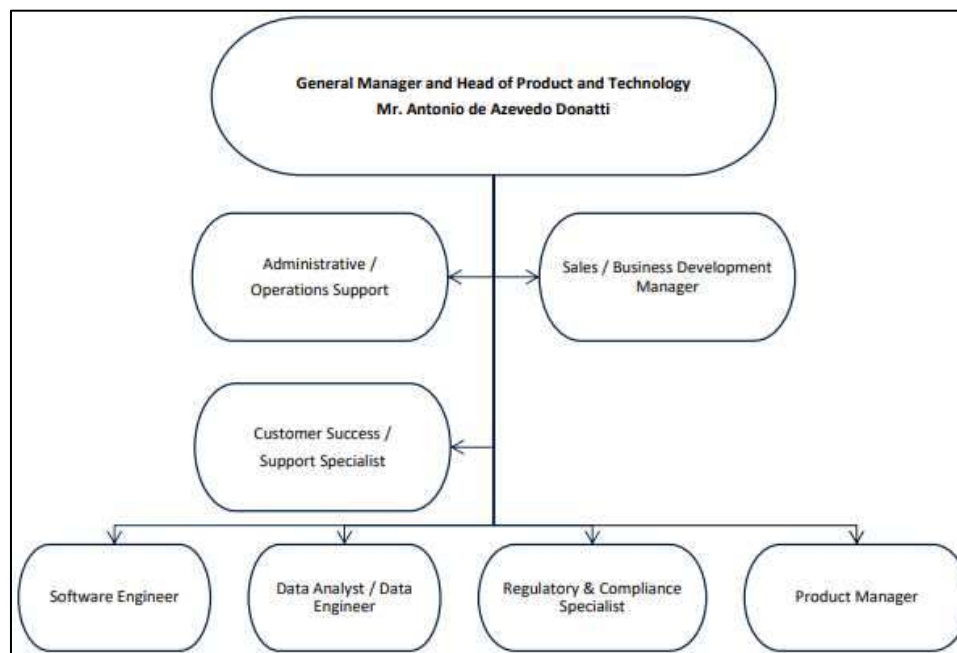
The proposed endeavor has significant potential to employ U.S. workers:

As described in the Business Plan and summarized in Section 2, IntellexIA Health Technologies is structured for phased growth, including the development of internal capacity in technology, implementation, customer support, sales, compliance, operations, and administration. The company was not planned as an individual consulting practice, but as a scalable healthcare technology company with a hiring strategy aligned with platform adoption and operational expansion. (Exhibit C.I).

The company's workforce development will be essential to delivering AI-enabled SaaS solutions to healthcare organizations. As the platform grows, IntellexIA Health Technologies is expected to create roles related to software engineering, data analysis, AI implementation, SaaS deployment, healthcare compliance, product delivery, customer success, quality management, sales, and operational support. These functions are directly tied to the company's

¹³ O*NET Online, 13-1082.00 – Project Management Specialists, available at: <https://www.onetonline.org/link/summary/13-1082.00>

ability to develop, implement, monitor, and optimize its technology solutions across multiple clients and markets. (Exhibit C.I).



In addition to direct job creation, the proposed endeavor is expected to generate indirect economic activity through demand for cloud infrastructure, software tools, cybersecurity services, compliance consulting, professional services, implementation support, technology vendors, and commercial partnerships. These secondary effects are relevant because the company's growth will depend on a network of U.S.-based suppliers and service providers needed to support product development, deployment, hosting, security, sales, and ongoing client operations. (Exhibit C.I).

The Business Plan also projects positive economic contributions through revenue growth, tax payments, payroll taxes, and reinvestment into company operations. As discussed in Section 2, IntellexIA Health Technologies projects sales growth from **\$515,000 in Year 1 to \$3,103,187 in Year 5**, with combined federal, state, and payroll tax contributions estimated at **\$951,486** over five years. These projections demonstrate that the endeavor has measurable economic potential and was structured to generate concrete business activity in the United States. (Exhibit C.I).

The endeavor impacts a matter that government entities have described as having national importance:

The proposed endeavor is directly aligned with government-recognized priorities involving artificial intelligence, healthcare data modernization, interoperability, and healthcare price transparency. Federal materials emphasize the importance of AI leadership, responsible implementation of AI-enabled technologies, healthcare data infrastructure, and access to meaningful healthcare pricing information. These priorities are not abstractly related to the project; they correspond directly to the company's planned focus on AI-enabled automation,

healthcare data integration, procurement traceability, pricing intelligence, compliance support, and operational decision-making.

The national importance of the project is also reinforced by the scalability of its model. IntellexIA Health Technologies' SaaS platform and implementation methodology can be configured for different healthcare providers, allowing the company's impact to extend beyond a single client, facility, or local market. As the platform develops, the company may support healthcare organizations across different states and markets, addressing recurring operational challenges in the healthcare sector. (Exhibit C.I).

Below are the key points detailing the national importance of Mr. Donatti's project:

- **Improving Healthcare Operational Efficiency:** Through AI-enabled workflow automation and SaaS implementation, IntellexIA Health Technologies will help healthcare organizations reduce repetitive administrative work, improve internal coordination, and support faster and more reliable operational processes.

National Importance: Reduces administrative burden and supports more efficient healthcare operations, a recurring challenge among healthcare providers and markets across the United States.

- **Supporting Healthcare Data Integration and Interoperability:** The company will develop and implement tools that connect currently fragmented clinical, administrative, procurement, and operational data.

National Importance: Supports healthcare modernization through better data flow, greater operational visibility, and practical use of integrated information within healthcare organizations.

- **Enhancing Cost Visibility and Procurement Traceability:** IntellexIA Health Technologies will focus on pricing intelligence, OPME traceability, procurement workflows, and cost-sensitive operational processes.

National Importance: Aligns with federal healthcare price transparency priorities and supports better financial and administrative decision-making in healthcare operations.

- **Strengthening Compliance and Operational Governance:** The company will provide compliance and audit automation, workflow standardization, quality monitoring, and performance reporting.

National Importance: Helps healthcare organizations operate with greater consistency in regulated environments and strengthens governance over operational, procurement, and documentation processes.

- **Expanding Applied AI in Healthcare Operations:** The company will apply AI-enabled tools to practical healthcare workflows, including automation, analytics, decision support, and process optimization.

National Importance: Supports the responsible adoption of AI in a nationally relevant sector and contributes to the practical implementation of AI-enabled solutions in healthcare operations.

- **Generating Economic and Workforce Contributions:** Through projected revenue growth, tax contributions, hiring, suppliers, and service expansion, IntellexIA Health Technologies is expected to generate measurable economic activity in the United States.

National Importance: Supports skilled employment, technology-sector growth, and economic activity associated with healthcare innovation and SaaS implementation.

In conclusion, IntellexIA Health Technologies represents a technology initiative with strong potential to generate operational, economic, and workforce benefits in the United States. The proposed endeavor satisfies the first prong of *Matter of Dhanasar* by demonstrating substantial merit and national importance through its contribution to healthcare efficiency, AI-enabled modernization, interoperability, cost visibility, compliance support, and scalable healthcare technology implementation.

3.2.Second PRONG:

The Petitioner is Well Positioned to Advance the Proposed Endeavor

Under the second prong of *Matter of Dhanasar*, USCIS evaluates whether the petitioner is well positioned to advance the proposed endeavor. This analysis may consider the petitioner's education, skills, knowledge, record of success, model or plan for future activities, progress already made toward the endeavor, and interest shown by relevant third parties.

Mr. Donatti is well positioned to advance the proposed endeavor because his trajectory combines a STEM academic background in Information Systems, graduate-level study in Business Administration with emphasis in Project Management, professional certifications, membership in the Project Management Institute (PMI), progressive experience in HealthTech/SaaS, leadership in complex healthcare technology projects, measurable results, third-party support, documented financial stability, and a concrete Business Plan for IntellexIA Health Technologies. (Exhibits A, B, C.I, and C.II).

3.2.1. Academic Background, STEM Foundation, and Professional Certifications

Mr. Donatti's academic background is directly relevant to the proposed endeavor. His foreign education was evaluated as equivalent in the United States to a Bachelor of Science in Information Systems, complemented by one year of graduate study in Business Administration. This education provides the technical foundation necessary to understand and lead projects

involving digital systems, databases, information integration, security, automation, analytics, and implementation of technology solutions in complex environments. (Exhibit B).

Academic Equivalency in the United States
BACHELOR OF SCIENCE IN INFORMATION SYSTEMS
ONE YEAR OF GRADUATE STUDY IN BUSINESS ADMINISTRATION

In addition, his academic evaluation describes a technical curriculum in Information Systems, including Mathematical Foundations of Computer Science, Object-Oriented Programming, Data Structures, Database, Systems Analysis and Design, Operating Systems, Software Engineering, Computer Networks, Intelligent Systems, Data Mining, Information and Network Security, and Project Management. This academic foundation is directly applicable to IntellexIA Health Technologies' model, which will require systems integration, data architecture, automation, dashboards, interoperability, information security, and SaaS implementation in healthcare. (Exhibit B).

His graduate-level study in Business Administration with emphasis in Project Management complements his technical foundation with training in project management, strategy, stakeholder management, risk, cost, scope, quality, digital transformation, Scrum, portfolio management, and PMO. This combination of technical education and project management training is particularly important because the proposed endeavor will require not only technological knowledge, but also the ability to translate healthcare operational needs into products, workflows, processes, and scalable solutions. (Exhibit B).

Mr. Donatti also holds professional certifications and specialized training directly related to the execution of the proposed endeavor, including Project Management Professional (PMP®), Certified Scrum Product Owner (CSPO®), and specialized training in Generative AI for Project Managers, Prompt Engineering for Project Managers, Data Landscape of Generative AI for Project Managers, Practical Application of Generative AI for Project Managers, and AI in Agile Delivery. In addition, his membership in the Project Management Institute (PMI) reinforces his participation in a recognized professional community dedicated to project management, governance, delivery, professional standards, and continuous development.¹⁴ (Exhibit C.II).

These qualifications are not merely formal credentials. The PMP® credential demonstrates mastery of project management practices, including scope, risk, schedule, resources, stakeholders, and value delivery. The CSPO® certification reinforces his ability to work at the intersection of product, technology, backlog management, prioritization, and client needs. His generative AI and AI in Agile Delivery training supports IntellexIA's proposed implementation of AI-enabled solutions in real healthcare processes. Together, these qualifications support his

¹⁴ Project Management Institute, *Project Management Professional (PMP)® Certification*, available at: <https://www.pmi.org/certifications/project-management-pmp>

ability to lead a SaaS company focused on automation, interoperability, data integration, and operational efficiency in the healthcare sector.



3.2.2. Progressive Experience in HealthTech, SaaS, and Healthcare Systems Implementation

In addition to his academic credentials and certifications, Mr. Donatti's professional history demonstrates consistent progression into roles of increasing responsibility. He began his career in software testing and validation, advanced into systems analysis and Product Owner responsibilities on national-impact projects for Brazil's Ministry of Health, then assumed Project Coordinator and Project Manager roles in HealthTech, and currently serves as Service Delivery Manager across multiple healthcare SaaS platforms. This progression demonstrates both technical execution and operational leadership necessary to implement the proposed endeavor. (Exhibits A and B).

His early experience as a Software Tester at Dígito Tecnologia and Laboratório Bridge provided practical grounding in software quality, functional validation, manual and automated testing, defect analysis, system stability, regression testing, and production-readiness. This stage is relevant because IntellexIA Health Technologies will depend on reliable platforms, testing workflows, quality gates, defect monitoring, and release readiness to serve healthcare organizations in regulated environments. (Exhibit A).

At Laboratório Bridge, Mr. Donatti advanced to Systems Analyst and acted as Product Owner on strategic projects for Brazil's Ministry of Health (SUS), supporting interoperability and national-scale public healthcare systems. His responsibilities included leading workshops, interviews, and requirements sessions with technical and clinical teams, translating regulatory requirements into technical backlogs, preparing functional and technical documentation, and maintaining direct communication with the Ministry of Health. This experience demonstrates familiarity with healthcare systems at scale, regulatory requirements, and technology delivery in complex environments. (Exhibits A and B).

At EMS Ventura Ltda., his work became even more directly aligned with the proposed endeavor. As Project Coordinator, he planned Agile sprint cycles, prioritized technical backlogs, defined release schedules, supported the launch of healthcare products under regulatory constraints, led multidisciplinary squads, and structured executive reports with productivity, quality, and performance metrics. These activities are directly compatible with launching and scaling a SaaS operation that requires delivery cadence, client alignment, operational metrics, and coordination between technical and business teams. (Exhibits A and B).

Later, as Project Manager, Mr. Donatti managed multiple concurrent software development and product delivery projects for the healthcare sector. His resume records leadership in ERP integrations with TOTVS, SAP, MV, and Benner using APIs, webhooks, and JSON/XML, ensuring traceability and compliance with ANS regulations. It also records cloud infrastructure migration with AWS and Google Cloud, as well as the development of HealthTech solutions involving AI, OPME traceability, technovigilance, and automation for healthcare operators and hospitals. (Exhibits A and B).

This experience is central to IntellexIA Health Technologies because the proposed endeavor will require exactly this type of execution: systems integration, workflow automation, process traceability, dashboards, regulatory compliance, cloud deployment, product structuring, team coordination, and value delivery for healthcare organizations.

Currently, as Service Delivery Manager, Mr. Donatti leads delivery governance and quality management across multiple HealthTech SaaS platforms. His duties include defining quality gates, acceptance criteria, testing standards, manual and automated QA strategy, regression validation, release readiness, KPI monitoring, defect trend analysis, production incident management, and daily alignment with Product Managers, Software Engineers, and QA teams. This experience directly supports his ability to lead IntellexIA Health Technologies with operational stability, quality governance, and execution discipline. (Exhibits A and B).

3.2.3. Demonstrated Results, Measurable Impact, and Third-Party Support

Mr. Donatti's history is not limited to titles or responsibilities. The record demonstrates measurable results in technology, product delivery, healthcare operations, automation, systems integration, and data-driven governance. His experience includes technology projects related to Brazil's Ministry of Health/SUS, where he worked with requirements, technical

documentation, interoperability, and public healthcare systems delivery. Later, at EMS Ventura, he led HealthTech projects for healthcare operators and hospitals, including systems integration, traceability, regulatory compliance, OPME, technovigilance, cloud modernization, and workflow automation. His resume also states that he led an AI-powered support automation initiative coordinating more than 15 professionals and reducing support ticket volume by 43%; managed a healthcare system implementation for a national operator involving more than 300 professionals; and structured a customized billing model that resulted in 13% annual revenue growth and a 32% reduction in unproductive demands. (Exhibits A and B).

These results are directly relevant to the second prong because they demonstrate that Mr. Donatti has already delivered, in practice, the same types of improvements he intends to offer in the United States: automation, efficiency, governance, waste reduction, systems integration, traceability, dashboards, technology modernization, product management, and improved use of data in regulated healthcare and SaaS environments. The support letters further corroborate these records by confirming additional results in institutions such as Golden Cross, CABERJ, Unimed Nacional, Saúde Petrobras, and Unimed do Brasil, including cost reduction, reduced operational turnaround time, increased productivity, improved traceability, and stronger data-driven managerial decision-making. (Exhibits A, B, and C.II).

The Laboratório Bridge letter, issued by Lucas Postal, Project Supervisor and Legal Representative, supports the earlier technical phase of Mr. Donatti's career. It confirms that Mr. Donatti worked on technology projects focused on the public and healthcare sectors, including requirements gathering, stakeholder workshops, technical specifications, backlog management, agile sprints, acceptance criteria, functional and technical documentation, and collaboration with development and quality teams. This support is important because it shows that, before his later work in private HealthTech and SaaS environments, Mr. Donatti had already developed the ability to connect institutional healthcare needs with technical execution and "secure, compliant, and timely deliveries."

(Exhibit B – Letter from Lucas Postal, Project Supervisor / Legal Representative, Laboratório Bridge – UFSC).

Luíza Reis, Manager of OPME and Medications at Unimed do Brasil, is a healthcare professional with extensive experience in supplemental healthcare, auditing, regulation, OPME purchasing, high-cost medications, and team management. She worked with Mr. Donatti across projects involving Golden Cross, CABERJ, and Unimed do Brasil, when he served as project and product manager at EMS Ventura. Her letter explains that these projects were designed to improve operational flow, system implementation, and integration between technical and healthcare areas, reducing fragmented manual processes and strengthening control over OPME and medication-related workflows.

Ms. Reis reports concrete results from this work. At Golden Cross, she observed Mr. Donatti's performance in structuring systemic solutions that led to a "34 percent reduction in OPME acquisition costs." Later, at CABERJ, she states that the team achieved a "28 percent reduction in costs" in a project involving oncology medication management, while strengthening financial control and reducing healthcare risks. These results demonstrate that Mr. Donatti's work generated measurable operational and financial improvements in regulated healthcare environments.

(Exhibit C.II – Letter from Luíza Reis, Manager of OPME and Medications, Unimed do Brasil).

Priscilla Araujo Ferreira, Hospital Supplies Supervisor at Unimed Nacional, is a pharmacist with extensive experience in health insurance providers, hospital supplies, high-cost medications, OPME, regulation, auditing, supplier qualification, pharmacovigilance, and healthcare process improvement. Her letter confirms that she began working with Mr. Donatti in August 2020, during his tenure as Project Manager at EMS Ventura, in strategic projects involving high-cost medications, oncology treatment management, chronic patient management, system integration, and automation of operational workflows.

Ms. Ferreira explains that the purpose of the implementation was to reduce reliance on manual processes, improve traceability, integrate operational, auditing, billing, supplier, and technology teams, and support better control over authorization, external confirmation, delivery, automatic status return, and billing integration. She reports that processes previously requiring up to “five business days” were reduced to “one day,” while productivity increased by “more than 35 percent.” This evidence directly supports Mr. Donatti’s positioning because it demonstrates practical experience in workflow automation, operational efficiency, traceability, compliance, and data-driven decision-making in a highly regulated healthcare environment.

(Exhibit C.II – Letter from Priscilla Araujo Ferreira, Hospital Supplies Supervisor, Unimed Nacional).

Cláudia Cunha, OPME Purchasing Coordinator at Saúde Petrobras, has more than two decades of experience in supplemental healthcare, auditing, claims analysis, OPME management, supplier negotiation, provider contracts, cost control, and regulatory compliance. She evaluated Mr. Donatti’s work in 2024, when he was serving as Service Delivery Manager at EMS Ventura and acted as Saúde Petrobras’ “primary technical and managerial point of contact” during the implementation of a specialized OPME quotation and management platform.

The purpose of this project was to replace manual and fragmented procurement workflows with a centralized governance model capable of improving supplier management, product traceability, automated workflows, auditability, and cost-control visibility. Ms. Cunha confirms that Mr. Donatti helped connect formal technical requirements with the practical needs of auditing and purchasing operations, and that the implementation strengthened compliance, centralized data, increased decision traceability, and eliminated information dispersion across multiple systems. She further reports that managerial dashboards enabled real-time monitoring and revealed “savings exceeding 35 percent” in OPME negotiations.

(Exhibit C.II – Letter from Cláudia Cunha, OPME Purchasing Coordinator, Saúde Petrobras).

Ms. Cunha also describes Mr. Donatti as a project and product manager distinguished by disciplined planning, clear scope definition, and an understanding of regulatory and economic nuances in healthcare. She concludes that his ability to deliver stable and evolving platforms raised the standard for OPME management and supported sustainable cost-containment strategies.

“Mr. Donatti’s performance as a project and product manager is distinguished by his disciplined planning, clear scope definition, and deep understanding of the regulatory and economic nuances of the healthcare sector.”

“His ability to deliver stable, evolving platforms has left a lasting legacy at Saúde Petrobras, raising the standard for OPME management and ensuring the sustainability of our cost-containment strategies.”

(Exhibit C.II – Letter from Cláudia Cunha, OPME Purchasing Coordinator, Saúde Petrobras).

Robson Oliveira, Administrative Specialist at Decision and a professional involved with Associação Petrobras de Saúde, further corroborates the Saúde Petrobras implementation from the perspective of data, indicators, dashboards, and operational monitoring. His background includes more than twelve years of experience in supply, logistics, data analysis, BI, ETL, Power BI, SAP Ariba, performance indicators, process design, and healthcare supply operations. His letter is relevant because it evaluates Mr. Donatti’s work through the lens of data governance, dashboard development, indicator monitoring, and management reporting.

Mr. Oliveira confirms that he worked directly with Mr. Donatti on the EMS Ventura platform implementation for Saúde Petrobras, which began in August 2024. According to his letter, Mr. Donatti exercised “technical and managerial leadership” during the definition of indicators, validation of data sources, structuring of analytical dashboards, and analysis of results generated by the platform. Mr. Oliveira also confirms that the project made it possible to evidence reductions exceeding 35 percent in OPME negotiations, reduce manual rework, increase efficiency in the generation of management indicators and reports, and make those indicators a permanent part of the area’s decision-making routine.

(Exhibit C.II – Letter from Robson Oliveira, Administrative Specialist, Decision / Associação Petrobras de Saúde).

Finally, Eduardo Porto, Regional Manager at Sherwin-Williams Automotive Finishes in the United States, provides an independent evaluation of Mr. Donatti’s professional profile. Unlike the other recommenders, Mr. Porto expressly states that he does not have personal knowledge of Mr. Donatti’s work and that his assessment is based on an “expert independent evaluation” of Mr. Donatti’s curriculum vitae, performance records, technology and management projects, and descriptions of initiatives in the supplementary healthcare sector. Accordingly, his letter should be viewed as an external management and market-oriented assessment, rather than direct project testimony.

Mr. Porto’s evaluation is nevertheless relevant because he reviews Mr. Donatti’s profile from the perspective of operational efficiency, process governance, financial accountability, and data-driven management in the United States. Based on his review, he concludes that Mr. Donatti’s profile combines project management, technological product development, process automation, systems interoperability, governance, and strategic use of data. He further states that Mr. Donatti’s expertise in “operational automation and analytics” is directly aligned with challenges faced by healthcare organizations, including rising operational costs, administrative inefficiencies, and the need for more integrated and value-oriented care models.

(Exhibit C.II – Independent Evaluation Letter from Eduardo Porto, Regional Manager, Sherwin-Williams Automotive Finishes).

Taken together, these support letters demonstrate that Mr. Donatti's qualifications are not theoretical. They confirm a consistent professional pattern: first, the development of technical and analytical capabilities in software and public healthcare systems; then, the application of those capabilities in HealthTech and SaaS environments; and finally, the delivery of measurable results in cost reduction, workflow automation, traceability, dashboards, governance, compliance, and data-driven decision-making for healthcare organizations.

This third-party evidence directly supports the second prong of Matter of Dhanasar. Mr. Donatti is well positioned to advance IntellexIA Health Technologies because he has already performed, in real and regulated environments, the same type of work that his proposed endeavor requires: transforming complex healthcare workflows into scalable technology solutions, coordinating technical and operational stakeholders, implementing systems, reducing manual processes, improving traceability, structuring dashboards, and producing measurable financial and operational results. (Exhibits A, B, C.I, and C.II).

3.2.4. Financial Capacity and Step Towards Advancing the Proposed Endeavor

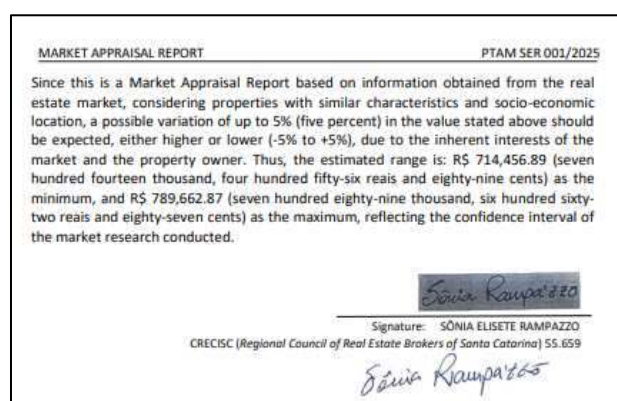
Mr. Donatti also demonstrates professional stability and consistent financial progression, which further supports his ability to structure and advance the proposed endeavor. The accountant letter submitted with this petition reports annual income of R\$ 100,112.60 in 2020, R\$ 164,640.15 in 2021, R\$ 210,009.87 in 2022, R\$ 259,184.70 in 2023, and R\$ 213,494.78 in 2024, all derived from service provision and salaried employment income. This progression demonstrates economic development consistent with his professional trajectory in technical and managerial positions of increasing responsibility. (Exhibit C.II).

I, Arnaldo Cesar Chequetto, accountant, holder of AC CON Contabilidade SS Ltda, registered in the National Register of Legal Entities (CNPJ) under No. 05.070.278/001-59, hereby declare, for all due purposes, that Mr. **Antonio de Azevedo Donatti**, Brazilian, married, holder of CPF No. 06160348906, has, based on the income tax declarations of the last five years, an annual income of:

- **In 2020:** \$100,112.60, derived from the provision of services, with employment income
- **In 2021:** \$164,640.15, derived from the provision of services, with employment income.
- **In 2022:** \$210,009.87, derived from the provision of services, with employment income.
- **In 2023:** R\$259,184.70, derived from the provision of services, with employment income.
- **In 2024:** R\$213,494.78, derived from the provision of services, with employment income.

In addition, his 2025 Brazilian income tax return records taxable income of R\$ 213,494.78 for calendar year 2024, assets and rights totaling R\$ 363,278.96 as of December 31, 2024, and no debts or encumbrances as of December 31, 2024. This documentation further supports his personal financial capacity, patrimonial stability, and ability to support the initial execution phase of IntellexIA Health Technologies in the United States. (Exhibit C.II).

In addition to his reported income, tax records, and absence of debts or encumbrances, Mr. Donatti also submitted a Market Appraisal Report for his real estate asset in Florianópolis, Brazil. The report identifies the property as owned by Mr. Donatti and concludes an estimated market value of R\$752,059.88, with a valuation range between R\$714,456.89 and R\$789,662.87. This real estate asset further supports his patrimonial stability and provides additional evidence of his asset-backed financial capacity to support the early execution phase of IntellexIA Health Technologies. (Exhibit C.II).



These financial documents are not presented as a substitute for the Business Plan, but as complementary evidence of income progression, patrimonial stability, personal organization, and financial capacity. In the context of the second prong, they reinforce that Mr. Donatti has practical conditions to initiate and sustain the early stages of the proposed endeavor, together with the initial investment and operating structure described in the Business Plan. (Exhibits C.I and C.II).

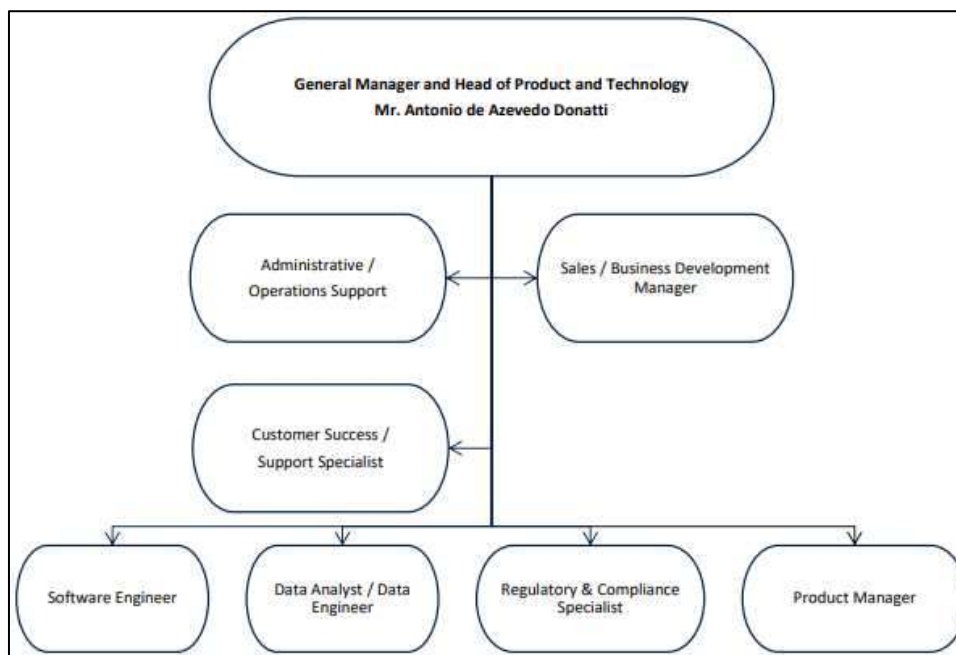
This financial progression is also consistent with remuneration above the general market benchmark for his current professional role in Brazil. According to Glassdoor salary data for Service Delivery Managers in Brazil, the average base salary is approximately R\$13,000 per month, with reported base salaries ranging from R\$8,000 to R\$17,000 per month, plus average variable compensation of approximately R\$1,000 per month. Mr. Donatti's reported annual income of R\$213,494.78 in 2024, equivalent to approximately R\$17,791 per month, places his remuneration above the reported average and near or above the upper range of the base salary benchmark for this role. This supports the conclusion that his professional work has been compensated at a level consistent with senior technical-managerial responsibility in the Brazilian market.



3.2.5. Business Plan and Concrete Execution Strategy

The Business Plan demonstrates that Mr. Donatti has a concrete plan to advance the proposed endeavor. IntellexIA Health Technologies has been structured with a defined headquarters in Naples, Florida, identified target clients, defined services, a market-entry strategy, initial investment, financial projections, a hiring plan, and a planned organizational structure. This business planning reinforces that the proposed endeavor is not an abstract intention, but an organized initiative with a documented operating model and execution pathway. (Exhibit C.I).

The planned organizational structure also reinforces the endeavor's execution capacity and scalability. The organizational chart identifies Mr. Donatti as General Manager and Head of Product and Technology, supported by administrative support, business development, customer success, software engineering, data analysis/data engineering, regulatory and compliance, and product management functions. This structure demonstrates that the company was planned to build internal capacity in areas essential for development, implementation, support, compliance, sales, and platform expansion. (Exhibit C.I).



The strategy documented in the Business Plan is also consistent with Mr. Donatti's experience. The company will require technical and managerial leadership in product delivery, systems integration, automation, analytics, compliance, client support, process standardization, and continuous improvement. These are areas in which Mr. Donatti has already accumulated practical experience throughout his professional trajectory, especially in HealthTech, SaaS, healthcare systems implementation, and service delivery management. (Exhibits A, B, and C.I).

Taken together, Mr. Donatti's STEM academic background in Information Systems, graduate-level study in Business Administration with emphasis in Project Management, professional certifications, PMI membership, progressive experience in HealthTech/SaaS, record of leadership in healthcare technology projects, support letters, documented financial progression,

patrimonial stability, and Business Plan demonstrate that he is well positioned to advance the proposed endeavor. Therefore, the second prong of *Matter of Dhanasar* is satisfied.

3.3.Third PRONG:

On Balance, It Would Be Beneficial to the United States to Waive the Job Offer and Labor Certification Requirements

Under the third prong of *Matter of Dhanasar*, USCIS evaluates whether, on balance, it would be beneficial to the United States to waive the job offer and labor certification requirements. This analysis considers whether, given the nature of the proposed endeavor, the petitioner's qualifications, and the expected benefits, requiring a specific job offer and labor certification would be appropriate, or whether a waiver would better allow the petitioner to advance an initiative serving the national interest.

In Mr. Donatti's case, the waiver is beneficial to the United States because the proposed endeavor does not depend on a traditional position with a single employer. IntellexIA Health Technologies is structured as an independent, scalable, technology-driven business initiative with the potential to serve multiple healthcare organizations, develop SaaS solutions, create jobs, generate economic activity, and support relevant priorities in the healthcare sector, including automation, interoperability, data integration, pricing intelligence, compliance, traceability, and data-driven decision-making. (Exhibit C.I).

Requiring a specific job offer would limit Mr. Donatti's ability to execute the endeavor as planned. His project requires autonomy to lead the company, define product priorities, develop partnerships, hire personnel, adapt solutions to different clients, respond to operational needs in healthcare, and scale the platform into new markets. A traditional employment position could restrict his work to one internal role, one employer, or a limited set of responsibilities, whereas the proposed endeavor requires entrepreneurial leadership and the ability to implement solutions across multiple healthcare environments.

Moreover, the labor certification process would not be the most appropriate mechanism to evaluate the value of the proposed endeavor. Labor certification is designed to test the labor market for a specific position offered by a specific employer. Here, however, the proposed benefit does not arise merely from filling one job opening, but from creating and leading a healthcare technology company with a scalable SaaS model, hiring plan, financial projections, organizational structure, defined services, and potential impact across multiple clients and markets. (Exhibit C.I).

Mr. Donatti also possesses qualifications directly tied to the project's success. His education in Information Systems, graduate-level study in Business Administration with emphasis in Project Management, PMP® and CSPO® certifications, PMI membership, AI-related training, progressive experience in HealthTech/SaaS, and demonstrated record in automation, OPME, dashboards, ERP integration, cloud modernization, quality, and service delivery show that he is qualified to lead the execution of IntellexIA Health Technologies. (Exhibits A, B, and C.II).

The support letters further reinforce this conclusion. For example, the letter from Cláudia Cunha demonstrates that Mr. Donatti has already participated in technology implementation involving supplier management, product traceability, automated workflows, OPME, compliance, managerial dashboards, and savings exceeding 35% in OPME negotiations. This evidence shows that his proposed work in the United States is a coherent extension of prior practical experience, not a speculative intention. (Exhibit C.II).

The financial and operational structure of the endeavor also favors granting the waiver. As described in the Business Plan, IntellexIA Health Technologies will require initial investment, technology development, phased hiring of professionals, acquisition of tools, engagement of suppliers, and service expansion. The plan projects sales growth, positive net profit, tax contributions, and gradual job creation during the company's first years. These elements demonstrate that the waiver would allow Mr. Donatti to advance an initiative with potential economic and operational benefits in the United States. (Exhibit C.I).

Mr. Donatti's personal financial capacity also supports this analysis. The accountant letter and Brazilian income tax return demonstrate income progression, patrimonial stability, and no debts or encumbrances as of December 31, 2024. These documents do not substitute the Business Plan, but they reinforce that Mr. Donatti has professional stability and practical conditions to support the early execution phase of the endeavor. (Exhibit C.II).

On balance, the benefits of allowing Mr. Donatti to independently advance his company outweigh the utility of requiring a job offer and labor certification. Granting the waiver will allow him to act as founder and leader of IntellexIA Health Technologies, execute the Business Plan, develop healthcare technology solutions, build a team, serve multiple clients, expand geographically, and contribute to areas recognized as relevant to the United States, including AI adoption, healthcare data modernization, interoperability, price transparency, and operational efficiency.

Therefore, considering the scalable and independent nature of the proposed endeavor, the direct connection between Mr. Donatti's qualifications and the execution of the project, the documented business plan, evidence of prior results, potential job creation, and expected economic and operational benefits, it would be beneficial to the United States to waive the job offer and labor certification requirements. Accordingly, the third prong of Matter of Dhanasar is satisfied.

4. FINAL CONSIDERATIONS

The evidence submitted with this petition demonstrates, by a preponderance of the evidence, that Mr. Donatti satisfies the requirements for EB-2 classification as a professional holding an advanced degree. His foreign academic credentials have been evaluated as equivalent in the United States to a Bachelor of Science in Information Systems, complemented by one year of graduate study in Business Administration, and his record demonstrates more than five years of progressive post-baccalaureate professional experience in information technology, project

management, HealthTech, SaaS implementation, and healthcare technology operations. (Exhibits A and B).

The record also demonstrates that Mr. Donatti satisfies the three-prong framework established in *Matter of Dhanasar*.

- i. **His proposed endeavor, through IntellexIA Health Technologies, has substantial merit and national importance** - it addresses operational challenges in the U.S. healthcare sector related to automation, interoperability, data integration, procurement intelligence, compliance, pricing visibility, traceability, and data-driven decision-making. The endeavor is also aligned with federal priorities involving artificial intelligence, healthcare data modernization, interoperability, and healthcare price transparency. (Exhibit C.I).
- ii. **Mr. Donatti is well positioned to advance the proposed endeavor.** His STEM academic background, PMP® and CSPO® certifications, PMI membership, AI-related training, progressive experience in HealthTech/SaaS environments, leadership in complex healthcare technology projects, prior measurable results, third-party support letters, documented financial stability, and concrete Business Plan collectively demonstrate his ability to execute and scale IntellexIA Health Technologies in the United States. (Exhibits A, B, C.I, and C.II).
- iii. **On balance, it would be beneficial to the United States to waive the job offer and labor certification requirements.** The proposed endeavor is not limited to a position tied to a single employer; it is an independent, scalable, technology-driven business initiative planned to serve multiple healthcare organizations, create jobs, generate economic activity, and support the modernization of healthcare operations. Requiring labor certification would not adequately capture the broader value of Mr. Donatti's proposed work as founder and leader of IntellexIA Health Technologies.

In light of the evidence presented, Mr. Donatti respectfully submits that he qualifies for classification under the EB-2 category and that his proposed endeavor merits the grant of a National Interest Waiver. Accordingly, we respectfully request that USCIS approve Mr. Donatti's Form I-140 petition under the EB-2 classification and grant a waiver of the job offer and labor certification requirements in the national interest of the United States.

Thank you for your time and consideration to Mr. Donatti's application.

Respectfully submitted,



Otavio Haverroth Silva
California Bar # 343486

Exhibit list

Exhibits:

Pages:

Exhibit A

Curriculum Vitae of Antonio de Azevedo Donatti	1
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Exhibit B - Eligibility Criteria: Advanced Degree

Bachelor in Information Systems – Diploma and Transcript Universidade Federal de Santa Catarina – UFSC, 2017	2-9
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About UFSC	10-15
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Executive MBA in Management with Emphasis in Project Management – Diploma and Transcript - Fundação Getulio Vargas – FGV, 2023	16-23
--	-------

About FGV	24-29
-----------	-------

Academic Credential Evaluation	30-53
--------------------------------	-------

Exhibit B - Eligibility Criteria: Professional Experience Records

Laboratório Bridge - March 2014 to December 2017	54-56
--	-------

EMS Ventura Ltda - December 2017 to Present	57
---	----

Exhibit C.I - First Prong - Substantial Merit and National Importance

Business Plan for IntellexIA Health Technologies	58-121
--	--------

DHS STEM Designated Degree Program List	122-137
---	---------

White House – America’s AI Action Plan	138-140
--	---------

White House – Removing Barriers to American Leadership in Artificial Intelligence	141-144
---	---------

White House – Unlocking Cures for Pediatric Cancer with Artificial Intelligence	145-149
---	---------

White House – Healthcare Price Transparency Executive Order	150-153
White House Fact Sheet – Healthcare Price Transparency	154-157
U.S. Bureau of Labor Statistics – Project Management Specialists	158-163
O*NET Online – Project Management Specialists, 13-1082.00	164-168
Project Management Institute – PMP® Certification Materials	169-196

Exhibit C.II – Second Prong – Well-Positioned to Advance the Proposed Endeavor

All the documents of Exhibit B	197
Project Management Professional Certification - PMP®	198
Project Management Institute - PMI Membership	199-235
Certified Scrum Product Owner Certification - CSPO®	236
Generative Artificial Intelligence / AI-Related Certificates:	237-241

Exhibit C.II – Second Prong: Letters of Support

Ms. Cláudia Cunha – OPME Purchasing Coordinator, Saúde Petrobras	242-250
Mr. Eduardo Porto – Regional Manager, Sherwin-Williams Automotive Finishes	251-254
Ms. Luíza Reis – Manager of OPME and Medications, Unimed do Brasil – National Confederation of Medical Cooperatives	255-261
Ms. Priscilla Araujo Ferreira – Hospital Supplies Supervisor, Unimed Nacional	262-270
Mr. Robson Oliveira – Administrative Specialist, Decision / Associação Petrobras de Saúde APS	271-278

Exhibit C.II - Second Prong: Financial Feasibility and Personal Asset Evidence

Market Appraisal Report – Property Located at Rua Tenente Silveira, No. 600, Apartment 707, Florianópolis/SC	279-333
Real Estate Registration No. 11,037 – 1st Registry Office of Deeds and Real Estate Records of Florianópolis	334-341
Brazilian Income Tax Return – IRPF 2023 to 2025	342-361
Accountant Letter – Income Progression from 2020 to 2024 and Salary Benchmark Comparison	362-365

Exhibit C.III - Third Prong - Waiver of Job Offer and Labor Certification

All the documents of Exhibit C.I and C.II	366
---	-----

Exhibit D - Personal Documents

Birth Certificate and Corresponding Translation	367-369
Passport’s Biometrics Page	370-371
US Visa	372
Marriage Certificate and Corresponding Translation	373-375
Derivative’s Birth Certificate and Corresponding Translation	376-378
Derivative’s Passport Biometrics	379-380
Derivative’s US Visa	381

Exhibit A

ABOUT

Senior Project Manager with 12+ years of progressive experience in Information Technology, spanning quality assurance, systems analysis, and project and program leadership. My career has been built in complex, regulated environments—primarily HealthTech and SaaS—where I have led cross-functional teams of up to 300 professionals, managed multi-million-dollar budgets, and delivered enterprise-scale digital transformation initiatives on time and within scope.

As a Senior Project Manager, I specialize in translating business objectives into executable technical plans, orchestrating end-to-end delivery across product development, cloud modernization, AI automation, and ERP integration programs. Certified PMP® and CSPO®, I combine Agile and Waterfall methodologies to match each initiative's context—driving measurable outcomes through structured risk management, stakeholder alignment, and data-driven decision-making.

I have deep expertise in program governance, PMO frameworks, vendor management, capacity planning, and compliance in regulated industries (healthcare, GxP). I thrive in high-ambiguity, fast-paced environments where strategic thinking, executive communication, and hands-on execution converge to deliver business value.

Key Results:

- Led an AI-powered support automation initiative coordinating 15+ professionals, achieving measurable efficiency gains across ticket resolution
- Managed a healthcare system implementation for a national operator with 300+ professionals through the full project lifecycle
- Directed a cloud modernization program (AWS, Google Cloud) focused on migration, security, and cost optimization
- Structured a customized billing model resulting in 13% annual revenue growth and 32% reduction in unproductive demands
- Consolidated agile practices across the organization, increasing delivery speed and product quality by implementing Scrum at scale
- Led product discovery initiatives that translated market insights into actionable roadmaps and new revenue streams
- Reduced support ticket volume by 43% through AI automation initiative

EDUCATION

- 2023 Executive MBA, Project Management
- Fundação Getúlio Vargas
- 2017 Information Systems, Information Technology
- Universidade Federal de Santa Catarina

CERTIFICATION

- Scrum Product Owner Certification 
- Project Management Professional (PMP) 
- Generative AI Overview for Project Managers
- Data Landscape of Generative AI for Project Managers
- Talking to AI: Prompt Engineering for Project Managers
- Practical Application of Generative AI for Project Managers
- AI in Agile Delivery

LANGUAGE

English - Fluent

PROFESSIONAL EXPERIENCE

EMS Ventura Ltda

May, 2021 - Present

Service Delivery Manager

- Lead service delivery governance and quality management across multiple HealthTech SaaS platforms, ensuring compliance in regulated healthcare environments
- Define and enforce quality gates, acceptance criteria, and testing standards within Agile squads to meet stringent regulatory and operational requirements
- Coordinate end-to-end QA strategy spanning manual and automated testing, regression validation, and release readiness processes
- Monitor delivery performance through KPIs, defect trend analysis, and quality metrics dashboards to drive continuous improvement
- Serve as the escalation point for quality risks, production incidents, and critical release decisions, ensuring stakeholder confidence
- Collaborate daily with Product Managers, Software Engineers, and QA teams to align delivery cadence with product roadmaps and business priorities

PROFESSIONAL EXPERIENCE

EMS Ventura Ltda

May, 2018 - May, 2021

Project Manager

- Managed multiple concurrent software development and product delivery projects for the healthcare sector, driving high-impact outcomes with executive visibility
- Led complex ERP integration projects with TOTVS, SAP, MV, and Benner using APIs, webhooks, JSON/XML, ensuring traceability and compliance with ANS regulations
- Directed cloud infrastructure migration (AWS, Google Cloud), overseeing IAM, Docker, monitoring (Zabbix, Grafana), and cost optimization strategies
- Developed and launched innovative HealthTech solutions incorporating AI, OPME traceability, technovigilance, and automation for health operators and hospitals
- Negotiated a customized billing model that delivered 13% revenue growth and 32% reduction in unproductive demands through strategic backlog prioritization
- Facilitated organizational Agile transformation by leading training, workshops, and culture change initiatives focused on autonomy and continuous improvement

EMS Ventura Ltda

Dec, 2017 - May, 2018

Project Coordinator

- Planned and monitored Agile sprint cycles, prioritizing technical backlogs and defining release schedules in a fast-paced, startup-like environment
- Launched innovative healthcare products by managing scope, priorities, and cross-functional dependencies under regulatory constraints
- Led multidisciplinary squads and provided direct support to executive leadership on strategic goal-setting and resource allocation
- Structured Agile rituals adapted to the regulatory requirements of the healthcare sector, balancing compliance with delivery speed
- Created executive-level reports with productivity, quality, and performance metrics to drive data-backed decision-making
- Improved internal processes and stakeholder communication channels, strengthening alignment between technical teams and business objectives

Laboratório Bridge

May, 2015 - Dec, 2017

Systems Analyst

- Acted as Product Owner on strategic projects for the Ministry of Health (SUS), driving interoperability and national-scale impact across public healthcare systems
- Led stakeholder workshops, interviews, and requirement sessions with technical and clinical teams to define and prioritize product backlogs
- Translated regulatory requirements into actionable technical backlogs for Agile development squads, ensuring compliance and delivery alignment
- Co-founded and led the first Agile cell within the laboratory, pioneering modern project management practices in a government-facing context
- Produced comprehensive functional and technical documentation for development, QA, and approval workflows
- Maintained direct communication with the Ministry of Health, ensuring high-value public sector deliveries met policy and technical standards

Laboratório Bridge

Mar, 2014 - Apr, 2015

Software Tester

- Performed manual and automated software testing for complex national-impact systems, ensuring quality and reliability at scale
- Created test plans, test cases, and regression testing scenarios aligned with Agile sprint cadences
- Implemented test automation using Selenium, supporting automated regression and critical validation flows
- Collaborated closely with development teams to analyze defects, improve test coverage, and reduce rework cycles
- Supported quality assurance processes in Agile environments, contributing to continuous improvement of testing methodologies
- Participated in process optimization initiatives that enhanced overall software quality and delivery predictability

Dígítro Tecnologia

Oct, 2012 - Feb, 2014

Software Tester

- Executed functional testing and validated mission-critical software in a highly technical telecommunications environment
- Developed test scripts based on requirements specifications and industry quality standards for regulated software
- Documented and tracked bugs with focus on stability and security, ensuring production-readiness of critical systems
- Participated in cross-functional alignment meetings with development and QA teams to resolve defects efficiently
- Supported version approvals and production environment testing, reducing post-release incident rates
- Provided technical support to squads in investigating and resolving field incidents, contributing to customer satisfaction improvements

Exhibit B - Eligibility Criteria: Advanced Degree



Federative Republic of Brazil
Ministry of Education

FEDERAL UNIVERSITY OF SANTA CATARINA

The President of the Federal University of Santa Catarina, in the exercise of his duties and considering the completion of the Undergraduate Program in **Information Systems** on March 7, 2018, and conferral of degree held on March 7, 2018, hereby grants the degree of **Bachelor of Information Systems** upon

Antonio de Azevedo Donatti

Brazilian, born in the State of Santa Catarina on December 27, 1992, identity card No. 6333333/SC, and grants him this Diploma, with all the rights and privileges thereto appertaining.

Florianópolis, December 19, 2025

Original Signed

In accordance with Ordinance 554/2019/MEC

Prof. Dr. Álvaro Junio Pereira Franco

Program Coordinator

Original Signed

In accordance with Ordinance 554/2019/MEC

Prof. Dr. Irineu Manoel Souza

President

<https://diplomas.ufsc.br>

Validation Code

585.585.69c8b55e250d

CAGR Registration No.: 11201007

Federal University of Santa Catarina, reaccredited:
Ordinance No. 134/2013/MEC.
Program recognized by Ordinance/MEC No. 2691 of
09/02/2004, published in the Federal Official Gazette on
09/03/2004. Renewal of Program Recognition:
Ordinance No. 2159 of 12/06/2010, Federal Official
Gazette 12/07/2010.

Federal University of Santa Catarina
Vice-President's Office for Undergraduate Studies
Academic Administration Department

DIPLOMA REGISTERED in accordance with Law No.
9394/96, Article 48, Paragraph 1, of December 20, 1996.

Registration Information

Administrative Process 23080.073466/2025-43
Registration No. 127 Book: CTC/0023 Page No. 43

Florianópolis, December 19, 2025

**Original Signed in Accordance with Ordinance
554/2019/MEC**

Henrique Costa Braga
Division of Diploma Issuance and Registration
Registration No.: 116135

**Original Signed in Accordance with Ordinance
554/2019/MEC**

Cesar Trindade Neves
Director of the Academic Administration Department
Ordinance No.: 998/2016/GR
Registration No.: 82699

Digital Second Copy

Previous Copy Registration Information

Administrative Process 23080.073221/2017-14
Registration No. 409 Book: CTC/0016 Page No. 137



I, Raphael Michels Fantinato de Moura, telephone number [415 425-2508](tel:415-425-2508), mailing address P.O. Box 90487, San Diego, CA 92169, certify that the professional translation of this document from Portuguese to English has been performed by myself, a qualified translator fluent in both languages, and that the following is an accurate and complete translation of the document.

Raphael Michels Fantinato de Moura.

Date: February 23, 2026.



República Federativa do Brasil
Ministério da Educação

UNIVERSIDADE FEDERAL DE SANTA CATARINA

O Reitor da Universidade Federal de Santa Catarina, no uso de suas atribuições e tendo em vista a conclusão do curso de Graduação em **Sistemas de Informação** na data de 7 de Março de 2018 e a colação de grau realizada na data de 7 de Março de 2018, confere o título de **Bacharel em Sistemas de Informação** a

Antonio de Azevedo Donatti

de nacionalidade *brasileira*, natural do Estado de Santa Catarina, carteira de identidade com registro geral número 6333333/SC, nascido a 27 de Dezembro de 1992, outorgando-lhe o presente Diploma a fim de que possa gozar de todos os direitos e prerrogativas legais.

Florianópolis, 19 de Dezembro de 2025

Original Assinado
Segundo a Portaria 554/2019/MEC
Prof. Dr. Álvaro Junio Pereira Franco
Coordenador do Curso

Original Assinado
Segundo a Portaria 554/2019/MEC
Prof. Dr. Irineu Manoel de Souza
Reitor

<https://diplomas.ufsc.br>
Código de Validação
585.585.69c8b55e250d

Matrícula CAGR: 11201007

Universidade Federal de Santa Catarina, recredenciada:
Portaria nº 134/2013/MEC.

Curso reconhecido pela portaria/MEC nº 2691 de 02/09
/2004, publicado no DOU de 03/09/2004. Renovação de
Reconhecimento do Curso: Port. nº 2159 de 06/12/2010,
DOU 07/12/2010.

Universidade Federal de Santa Catarina
Pró-Reitoria de Graduação
Departamento de Administração Escolar

DIPLOMA REGISTRADO nos termos da Lei nº9394/96,
Artigo 48 e Parágrafo nº: 1º, de 20 de dezembro de 1996.

Informações do Registro

Processo administrativo 23080.073466/2025-43 Registro
nº 127 Livro: CTC/0023 Folhas nº: 43

Florianópolis, 19 de Dezembro de 2025

Original Assinado Segundo a Portaria 554/2019/MEC

Henrique Costa Braga
Divisão de Expedição e Registro de Diplomas
Matrícula :116135

Original Assinado Segundo a Portaria 554/2019/MEC

Cesar Trindade Neves
Diretor do Departamento de Administração Escolar
Portaria nº 998/2016/GR
Matrícula :82699

Superintendência de Governança Eletrônica e Tecnologia da Informação e Comunicação

Segunda Via Digital

Informações do Registro da Via Anterior

Processo administrativo 23080.073221/2017-14 Registro
nº 409 Livro: CTC/0016 Folhas nº: 137





FEDERAL UNIVERSITY OF SANTA CATARINA

Vice-President's Office for Graduate Studies
Academic Administration Department

UNDERGRADUATE ACADEMIC TRANSCRIPT SUMMARY

Enrollment No.: **11201007**

Student: **Antonio de Azevedo Donatti**

Date of Birth: **12/27/1992**

Gender: **Male**

Place of Birth: **Florianópolis/SC**

Nationality: **Brazilian**

ID No.: **6333333**

Issuing Authority: **SSP/SC**

CPF: **061.603.489-06**

Admission: **Entrance Examination**

Status: **Graduated**

Curriculum: **2011/1**

Workload: **3600**

Program: **238 INFORMATION SYSTEMS (Evening Program)**

Term 2011/1						
Course			Grade	Hours	Att.	Type
INE5676	Complementary Activities: Professional Experience			V	360	FS Ob Rv
IA - 0.00	IAA - 0.00	IAP - 0.00	Hours (total = 360		completed = 360)	
Term 2011/2						
Course			Grade	Hours	Att.	Type
CAD5240	Behavioral Aspects of the Entrepreneur			9.0	36	FS Ob
EGC5015	General Systems Theory			8.0	72	FS Ob
INE5601	Mathematical Foundations of Computer Science			8.5	72	FS Ob
INE5602	Introduction to Computer Science			6.0	72	FS Ob
INE5603	Introduction to Object-Oriented Programming			6.0	108	FS Ob
ZZD0061	National Student Performance Examination (ENADE) - Incoming Student / Exempted					
IA - 7.20	IAA - 7.20	IAP - 7.20	Hours (total = 720		completed = 720)	
Term 2012/1						
Course			Grade	Hours	Att.	Type
CAD5146	Personal Marketing in Computer Science			10.0	36	FS Ob
CAD7001	Introduction to Administration			9.5	72	FS Ob
INE5606	Probability and Statistics			7.0	72	FS Ob
IA - 6.70	IAA - 6.95	IAP - 7.66	Hours (total = 1080		completed = 900)	
Term 2012/2						
Course			Grade	Hours	Att.	Type
EGC5009	Idea Generation and Creativity in Computer Science			9.0	54	FS Ob
EPS5211	Economic and Financial Programming			7.0	54	FS Ob
INE5605	Object-Oriented Systems Development I			6.0	108	FS Ob
IA - 5.87	IAA - 6.64	IAP - 7.47	Hours (total = 1368		completed = 1116)	
Term 2013/1						
Course			Grade	Hours	Att.	Type
CAD5213	Organization, Systems and Methods			7.5	72	FS Ob
INE5609	Data Structures			7.0	108	FS Ob
INE5621	Computer Science and Society			7.0	36	FS Ob
INE5649	Statistical Prediction Techniques			6.5	72	FS Ob
IA - 7.00	IAA - 6.72	IAP - 7.34	Hours (total = 1656		completed = 1404)	
Term 2013/2						
Course			Grade	Hours	Att.	Type
INE5659	Strategic Management of Technologies, Information and Communication			8.0	72	FS Ob
IA - 3.00	IAA - 6.04	IAP - 7.38	Hours (total = 1944		completed = 1476)	
Term 2014/1						
Course			Grade	Hours	Att.	Type
EGC5010	Business Plan in Computer Science			7.0	36	FS Ob
INE5656	Introduction to Symbolic Logic			6.0	36	FS Op
IA - 4.66	IAA - 5.88	IAP - 7.33	Hours (total = 2160		completed = 1548)	
Term 2014/2						
Course			Grade	Hours	Att.	Type
IA - 7.50	IAA - 6.07	IAP - 7.36	Hours (total = 2412		completed = 1800)	

Term 2014/2						
Course		Grade	Hours	Att.	Type	
EGC5016	Planning of Information and Knowledge Systems	8.5	36	FS	Ob	
INE5423	Database I	6.5	72	FS	Ex	
INE5607	Computer Organization and Architecture	6.0	72	FS	Ob	
INE5651	Internship I	9.5	72	FS	Op	
IA – 7.50	IAA – 6.07	IAP – 7.36	Hours (total = 2412		completed = 1800)	
Term 2015/1						
Course		Grade	Hours	Att.	Type	
INE5608	Systems Analysis and Design	6.5	72	FS	Ob	
INE5611	Operating Systems	6.0	72	FS	Ob	
INE5612	Object-Oriented Systems Development II	7.0	72	FS	Ob	
IA – 6.50	IAA – 6.11	IAP – 7.25	Hours (total = 2628		completed = 2016)	
Term 2015/2						
Course		Grade	Hours	Att.	Type	
INE5614	Software Engineering	6.0	72	FS	Ob	
INE5616	Databases II	6.0	72	FS	Ob	
INE5617	Project Management	8.0	72	FS	Ob	
INE5622	Introduction to Compilers	7.0	72	FS	Ob	
INE5645	Parallel and Distributed Programming	9.5	72	FS	Ob	
IA – 7.30	IAA – 6.28	IAP – 7.25	Hours (total = 2988		completed = 2376)	
Term 2016/1						
Course		Grade	Hours	Att.	Type	
INE5638	Introduction to Projects	10.0	18	FS	Ob	
INE5643	Data Warehouse	6.0	72	FS	Ob	
INE5646	Web Programming	6.0	72	FS	Ob	
IA – 5.76	IAA – 6.22	IAP – 7.19	Hours (total = 3294		completed = 2538)	
Term 2016/2						
Course		Grade	Hours	Att.	Type	
INE5615	Computer Networks	6.0	72	FS	Ob	
INE5623	Database Design	8.0	36	FS	Ob	
INE5624	Usability Engineering	8.5	72	FS	Ob	
INE5631	Projects I	6.0	144	FS	Ob	
INE5633	Intelligent Systems	6.5	72	FS	Ob	
IA – 6.72	IAA – 6.28	IAP – 7.12	Hours (total = 3690		completed = 2934)	
Term 2017/1						
Course		Grade	Hours	Att.	Type	
EGC5018	Introduction to Innovation Management	8.0	72	FS	Ob	
INE5625	Distributed Computing	8.0	72	FS	Ob	
INE5644	Data Mining	6.0	72	FS	Ob	
IA – 7.33	IAA – 6.35	IAP – 7.14	Hours (total = 3906		completed = 3150)	
Term 2017/2						
Course		Grade	Hours	Att.	Type	
EGC5028	Innovation Habitats	8.5	72	FS	Ob	
INE5619	Administration and Management of Computer Networks	7.0	72	FS	Ob	
INE5660	Projects II	9.0	234	FS	Ob	
INE5680	Information and Network Security	6.0	72	FS	Ob	
ZZD0001	GRADUATED					
IA – 8.12	IAA – 6.54	IAP – 7.27	Hours (total = 4356		completed = 3600)	

Maximum Time Allowed for Degree Completion: 16
Semesters Completed: 13
Validated Semesters (Credit Transfer): 1
Extension Semesters (Art. 61 and 62, Resolution 17/CUn/97): 0

Graduation Date: 03/07/2018

Note: An undergraduate student is considered to have passed a course if they achieve sufficient attendance (FS) and a final grade equal to or higher than 6.0. The grading scale ranges from 0.0 to 10.0. Upon graduation, only courses with a passing grade will appear on the academic transcript (Art. 81, Resolution 17/CUn/97).

Legend:

Ob = Required, Op = Elective, Ex = Extracurricular, Rv = Credit Transfer, (I) = Incomplete, (R) = EFC Exemption, (V) = Complementary Activity, (S) = Withdrawal with Academic Credit, (FI) = Insufficient Attendance, IA = Grade Point Average, IAA = Total Grade Point Average, IAP = Total Grade Point Average in approved courses only, H/A = Class Hours

Universidade Federal de Santa Catarina, reaccredited by Ordinance No. 134/2013/MEC, published in the Federal Official Gazette on 02/28/2013, p. 34, Section 01.

Program recognized by Ordinance/MEC No. 2691 of 09/02/2004, published in the Federal Official Gazette on 09/03/2004. Renewal of Program Recognition: Ordinance No. 2159 of 12/06/2010, Federal Official Gazette 12/07/2010.

Florianópolis, January 5, 2026

The authenticity of this document may be verified at: <http://www.cagr.ufsc.br/autenticidade>
by entering the following code: 506992-45000004917094

Issued by: **Antonio de Azevedo Donatti**

SeTIC – Superintendence of Electronic Governance and Information and Communication Technology

I, Raphael Michels Fantinato de Moura, telephone number [415 425-2508](tel:4154252508), mailing address P.O. Box 90487, San Diego, CA 92169, certify that the professional translation of this document from Portuguese to English has been performed by myself, a qualified translator fluent in both languages, and that the following is an accurate and complete translation of the document.

Raphael Michels Fantinato de Moura.

Date: February 24, 2026.



UNIVERSIDADE FEDERAL DE SANTA CATARINA

Pró-Reitoria de Graduação
Departamento de Administração Escolar

HISTÓRICO SÍNTESE DE GRADUAÇÃO

Matrícula: 11201007

Aluno: Antonio de Azevedo Donatti

Nascimento: 27/12/1992

Sexo: Masculino

Natural: Florianópolis/SC

Nacionalidade: Brasileira

Identidade: 6333333

Orgão: SSP/SC

CPF: 061.603.489-06

Ingresso: Concurso vestibular

Situação: Formado

Curriculo: 2011/1

Carga Horária: 3600

Curso: 238 SISTEMAS DE INFORMAÇÃO (noturno)

Semestre 2011/1

Disciplina	Nota	H/A	Fr	Tipo
INE5676 Atividades Complementares: Vivência Profissional	V	360	FS	Ob Rv
IA - 0,00	IAA - 0,00	IAP - 0,00	H/A (total = 360 aprov = 360)	

Semestre 2011/2

Disciplina	Nota	H/A	Fr	Tipo
CAD5240 Aspectos Comportamentais do Empreendedor	9,0	36	FS	Ob
EGC5015 Teoria Geral de Sistemas	8,0	72	FS	Ob
INE5601 Fundamentos Matemáticos da Informática	8,5	72	FS	Ob
INE5602 Introdução à Informática	6,0	72	FS	Ob
INE5603 Introdução à Programação Orientada a Objetos	6,0	108	FS	Ob
ZZD0061 Exame Nacional de Desempenho dos Estudantes (ENADE)				
- Ingressante/Dispensado				
IA - 7,20	IAA - 7,20	IAP - 7,20	H/A (total = 720 aprov = 720)	

Semestre 2012/1

Disciplina	Nota	H/A	Fr	Tipo
CAD5146 Marketing Pessoal em Informática	10,0	36	FS	Ob
CAD7001 Introdução a Administração	9,5	72	FS	Ob
INE5606 Probabilidade e Estatística	7,0	72	FS	Ob
IA - 6,70	IAA - 6,95	IAP - 7,66	H/A (total = 1080 aprov = 900)	

Semestre 2012/2

Disciplina	Nota	H/A	Fr	Tipo
EGC5009 Geração de Ideias e Criatividade em Informática	9,0	54	FS	Ob
EPS5211 Programação Econômica e Financeira	7,0	54	FS	Ob
INE5605 Desenvolvimento de Sistemas Orientados a Objetos I	6,0	108	FS	Ob
IA - 5,87	IAA - 6,64	IAP - 7,47	H/A (total = 1368 aprov = 1116)	

Semestre 2013/1

Disciplina	Nota	H/A	Fr	Tipo
CAD5213 Organização, Sistemas e Métodos	7,5	72	FS	Ob
INE5609 Estruturas de Dados	7,0	108	FS	Ob
INE5621 Informática e Sociedade	7,0	36	FS	Ob
INE5649 Técnicas Estatísticas de Predição	6,5	72	FS	Ob
IA - 7,00	IAA - 6,72	IAP - 7,34	H/A (total = 1656 aprov = 1404)	

Semestre 2013/2

Disciplina	Nota	H/A	Fr	Tipo
INE5659 Gestão Estratégica de Tecnologias, Informação e Comunicação	8,0	72	FS	Ob
IA - 3,00	IAA - 6,04	IAP - 7,38	H/A (total = 1944 aprov = 1476)	

Semestre 2014/1

Disciplina	Nota	H/A	Fr	Tipo
EGC5010 Plano de Negócios em Informática	7,0	36	FS	Ob
INE5656 Introdução à Lógica Simbólica	6,0	36	FS	Op
IA - 4,66	IAA - 5,88	IAP - 7,33	H/A (total = 2160 aprov = 1548)	

Semestre 2014/2

Disciplina	Nota	H/A	Fr	Tipo
IA - 7,50	IAA - 6,07	IAP - 7,36	H/A (total = 2412 aprov = 1800)	

Semestre 2014/2

Disciplina	Nota	H/A	Fr	Tipo
EGC5016 Planejamento de Sistemas de Informação e Conhecimento	8,5	36	FS	Op
INE5423 Banco de Dados I	6,5	72	FS	Ex
INE5607 Organização e Arquitetura de Computadores	6,0	72	FS	Ob
INE5651 Estágio I	9,5	72	FS	Op
IA - 7,50	IAA - 6,07	IAP - 7,36	H/A (total = 2412 aprov = 1800)	

Semestre 2015/1

Disciplina	Nota	H/A	Fr	Tipo
INE5608 Análise e Projeto de Sistemas	6,5	72	FS	Ob
INE5611 Sistemas Operacionais	6,0	72	FS	Ob
INE5612 Desenvolvimento de Sistemas Orientados a Objetos II	7,0	72	FS	Ob
IA - 6,50	IAA - 6,11	IAP - 7,25	H/A (total = 2628 aprov = 2016)	

Semestre 2015/2

Disciplina	Nota	H/A	Fr	Tipo
INE5614 Engenharia de Software	6,0	72	FS	Ob
INE5616 Bancos de Dados II	6,0	72	FS	Ob
INE5617 Gerência de Projetos	8,0	72	FS	Ob
INE5622 Introdução a Compiladores	7,0	72	FS	Ob
INE5645 Programação Paralela e Distribuída	9,5	72	FS	Ob
IA - 7,30	IAA - 6,28	IAP - 7,25	H/A (total = 2988 aprov = 2376)	

Semestre 2016/1

Disciplina	Nota	H/A	Fr	Tipo
INE5638 Introdução a Projetos	10,0	18	FS	Ob
INE5643 Data Warehouse	6,0	72	FS	Ob
INE5646 Programação para Web	6,0	72	FS	Ob
IA - 5,76	IAA - 6,22	IAP - 7,19	H/A (total = 3294 aprov = 2538)	

Semestre 2016/2

Disciplina	Nota	H/A	Fr	Tipo
INE5615 Redes de Computadores	6,0	72	FS	Ob
INE5623 Projeto de Banco de Dados	8,0	36	FS	Ob
INE5624 Engenharia de Usabilidade	8,5	72	FS	Ob
INE5631 Projetos I	6,0	144	FS	Ob
INE5633 Sistemas Inteligentes	6,5	72	FS	Ob
IA - 6,72	IAA - 6,28	IAP - 7,12	H/A (total = 3690 aprov = 2934)	

Semestre 2017/1

Disciplina	Nota	H/A	Fr	Tipo
EGC5018 Introdução a Gestão da Inovação	8,0	72	FS	Op
INE5625 Computação Distribuída	8,0	72	FS	Ob
INE5644 Data Mining	6,0	72	FS	Ob
IA - 7,33	IAA - 6,35	IAP - 7,14	H/A (total = 3906 aprov = 3150)	

Semestre 2017/2

Disciplina	Nota	H/A	Fr	Tipo
EGC5028 Habitats de Inovação	8,5	72	FS	Op
INE5619 Administração e Gerência de Redes de Computadores	7,0	72	FS	Ob
INE5660 Projetos II	9,0	234	FS	Ob
INE5680 Segurança da Informação e de Redes	6,0	72	FS	Ob
ZZD0001 FORMADO				
IA - 8,12	IAA - 6,54	IAP - 7,27	H/A (total = 4356 aprov = 3600)	

Prazo máximo para integralização curricular: 16
Semestres cursados: 13
Semestres Revalidados: 1
Semestres de prorrogação. (Art. 61 e 62 Resolução 17/CUn/97): 0

Colação de Grau em: 07/03/2018

Observação: O aluno de graduação é considerado aprovado numa disciplina se obtém frequência suficiente (FS) e nota final igual ou superior a 6,0. A escala de notas é de 0,0 a 10,0. Quando formado somente as disciplinas com aprovação constarão do histórico escolar (Art.81 Resolução 17/CUn/97).

Legenda:

Ob = Obrigatória, Op=Optativa, Ex=Extracurso, Rv=Revalidada, (I) = Incompleto, (R) = Dispensa EFC, (V) = Atividade Complementar, (S) = Abandono com Aproveitamento, (FI) = Frequência Insuficiente, IA = Índice de Aproveitamento Semestral, IAA = IA acumulado, IAP = IA acumulado das disciplinas aprovadas, H/A = Horas Aula

Universidade Federal de Santa Catarina, recredenciada: Portaria nº 134/2013/MEC, publicada no Diário Oficial da União de 28/02/2013, pág. 34, seção 01.
Curso reconhecido pela portaria/MEC nº 2691 de 02/09/2004, publicado no DOU de 03/09/2004. Renovação de Reconhecimento do Curso: Port. nº 2159 de 06/12/2010, DOU 07/12/2010.

Florianópolis, 5 de Janeiro de 2026

A autenticidade desse documento pode ser verificada no endereço "<http://www.cagr.ufsc.br/autenticidade>" informando o seguinte código: 506992-45000004917094

Emitido por: Antonio de Azevedo Donatti

SeTIC - Superintendência de Governança Elet 9: a e Tecnologia da Informação e Comunicação

International ranking places UFSC in fifth place among industry supporters in Brazil.

09/10/2025 17:10



The **World University Rankings 2026**, compiled by the British magazine **Times Higher Education (THE)**, lists the Federal University of Santa Catarina (UFSC) in fifth place among the best-evaluated Brazilian universities in the *Industry* pillar. According to the **ranking methodology**, this score is attributed to the institution's ability to "help industry with innovations and inventions".

The **World University Rankings 2026**, released this Thursday, **October 9th**, provides assessments in five core pillars – *Teaching*, *Research Environment*, *Research Quality*, *Industry*, and *International Outlook* – in addition to an overall performance score.

Isabela Bianchi Pizzani, from the Naval Engineering Course at UFSC Joinville, explains the operation of the circulating water channel to her colleague. Photo: Gustavo Diehl/Agecom/UFSC

In the industry-related pillar, the ranking assigns UFSC a score of 65.5. In this criterion, only one other federal institution appears ahead of UFSC: the Federal University of Rio de Janeiro (UFRJ), which has 84.9 points. In first place in the industry-related pillar is the University of São Paulo (USP), with a score of 96.6.

According to the **document describing the methodology** used in the **World University Rankings 2026**, this criterion is divided between the number of patents generated by university research and the resources that the productive sector returns to the institutions.

"The metric suggests the extent to which companies are willing to pay for research and a university's ability to attract funding in the commercial market – useful indicators of institutional quality. But the extent to which universities are supporting their national economies through technology transfer is an area that deserves greater recognition," THE points out in the **methodology description**.

More than 2,100 institutions evaluated.

The **2026 World University Rankings** assessed 2,191 educational institutions in 115 countries and territories. In this edition, UFSC was ranked in the 1001-1200 range, considering its overall evaluation score. In this position, the ranking does not assign an exact position to institutions, only considering the range in which they fall. UFSC's scores in the main pillars were:

- *Overall* : 32.1-35.4
- *Education*: 36.3
- *Research Environment* : 22.4
- *Research Quality* : 40.8
- *Industry* : 65.5
- *International Perspective* : 37.0

Times Higher Education (THE) is a British magazine that publishes news and articles related to higher education, affiliated with The Times newspaper. THE also organizes other rankings and has previously ranked UFSC as the **fourth best university in Brazil in an interdisciplinary science ranking** , and **the institution has one of the three best Law courses in the country** .

2026

Explore the *Times Higher Education* World University Rankings 2026 below. Trusted worldwide by students, academics, governments and industry experts, the list of the best universities in the world includes 2,191 institutions from 115 countries and territories. [Read the full methodology here](#).

University rankings 2026: highlights

- **Oxford** retains the number one spot for the tenth consecutive year, driven by strong research environment score
- **Princeton** rises to joint third place, and is the only US university to achieve its best-ever finish this year
- **China** has five universities in top 40, up from three last year, but top universities remain steady
- **Hong Kong** occupies a record six spots in the top 200 as a result of improvements in teaching metrics
- **India** now has the second highest number of ranked universities for the first time, behind only the US

How to get your university ranked

Analyse your university's results

Academic Insights

2026



SANTA CATARINA			Locations			▼	Res
Rank ▼	Name	Overall 	Teaching 	Research Environment 	Research Quality 	Industry 	International Outlook 
1001–1200		Universidade Federal de Santa Catarina Brazil					





[Check out the mission, vision, and values of the Federal University of Santa Catarina.](#)

[Watch the institutional videos](#)

The act of creating the "University of Santa Catarina" was formalized by then-President Juscelino Kubitschek when he sanctioned Law No. 3,849, of December 18, 1960. Five years later, the designation "Federal" was incorporated into the name. For its initial formation, seven faculties located in the state capital, Florianópolis, were grouped together – Law (1932), Economics (1943), Dentistry (1946), Pharmacy and Biochemistry (1946), Philosophy (1952), Medicine (1957), and Social Work (1958) – and the School of Industrial Engineering was also created, thus possessing the necessary courses and legal support for its constitution. With the university reform of 1969, the faculties gave way to university units, as the teaching centers are called today.

The creation and physical infrastructure of the University involved the participation of two pioneering figures in the institution's history: professors Henrique da Silva Fontes (1885-1966) and João David Ferreira Lima (1910-2001). Fontes, who founded the Santa Catarina Faculty of Philosophy, conceived the "University City" project, to be implemented on state government land. Ferreira Lima favored a location in the city center, but the first proposal was approved by the University Council.

Professor and judge Henrique Fontes led the negotiations with the state government for the transfer of land from the Assis Brasil Model Farm. He also developed the project in partnership with professors Hélio de Queiroz Duarte and Ernesto Roberto de Carvalho Mange from the University of São Paulo (USP). Fontes' vision for that vast space donated for the construction of the university campus envisioned the future development of the institution, the region, and the local economy. The project, with the peculiarities of the time, offered schools and institutes, teaching and research, culture, recreation, and opportunities for interaction among students and staff.

Another important figure in the founding of UFSC was João David Ferreira Lima, appointed the first rector on September 16, 1961. He remained in this position until October 24, 1972, and was accompanied by two vice-rectors, Luiz Osvaldo D'Acâmpora (1962) and Roberto Mündel de Lacerda (1968). Ferreira Lima presided over the inaugural session of the University on March 12, 1962, which took place at the Álvaro de Carvalho Theater (TAC) in downtown Florianópolis. When the issue of location reached the University Council at the end of the 1960s, even though he was against it, he broke the tie in favor of the headquarters being built in the Trindade neighborhood, which today bears his name. He was also present at the appointment of the first staff members with President JK.

Current events

Throughout its history spanning more than six decades, the Federal University of Santa Catarina (UFSC) has established itself as one of the most respected higher education institutions in Brazil, recognized for its academic excellence, innovation, and commitment to sustainable development. Headquartered in Florianópolis, with campuses in the municipalities of Araranguá, Blumenau, Curitiba, and Joinville, UFSC promotes quality education and contributes to the economic, social, and technological advancement of the communities in which it is located.

Committed to the production, systematization, and socialization of knowledge in its most diverse forms, UFSC seeks to train critical citizens and professionals capable of building a more just and democratic society. It operates in an integrated manner in teaching, research, and outreach, promoting the inseparability of these areas. At the undergraduate level, it offers more than 120 courses, distributed in both on-campus and distance learning modalities, serving a community of approximately 29,000 students. At the postgraduate level, it has 89 programs, encompassing academic and professional master's degrees and doctorates, consolidating itself as a center for the generation and dissemination of knowledge. Furthermore, the institution maintains pioneering initiatives, such as the development of distance education (EaD) since the 1970s, and is currently a reference in Brazil in this area.

Research is one of the pillars of UFSC, which stands out for its scientific output, strategic partnerships, and impact in areas of national and international relevance. University extension, in turn, connects academia to society, promoting actions that transform communities and encourage civic education.

UFSC is also a benchmark in sustainability, implementing practices focused on the conscious use of natural resources and environmental education, in addition to promoting social inclusion policies that guarantee access and retention for students in vulnerable situations, people with disabilities, indigenous people, quilombola communities, and other groups. This commitment to diversity reflects the university's vocation to welcome and value differences, building a pluralistic and democratic environment.

Recognized as a model public institution, UFSC is a space for innovation, research, and social transformation. Through its academic excellence and social impact, it fulfills its mission of putting knowledge at the service of society.

Photo: Aerial view of the Trindade campus in Florianópolis. Credit: Archive/Agecom

[Text updated in June 2025]

PROGRAM COMPLETION DECLARATION

***Lato Sensu* Graduate Program, Specialization Level**

We hereby declare for all due purposes that Antonio de Azevedo Donatti, CPF: 06160348906, completed the *Lato Sensu* Graduate Program, Specialization Level: Executive MBA: Management with Emphasis in Project Management, started on 06/20/2022, and concluded on 08/19/2023, completing a total of 432 class-hours. The program is offered by the Schools of FGV, through the Institute for Educational Development - IDE/FGV, and comprises a total workload of 432 class-hours.

The *lato sensu* Graduate program, specialization level: Executive MBA: Management with Emphasis in Project Management, complies with the provisions of CNE/CES Resolution No. 01/2018 and CNE/CES Resolution No. 01/2007, the latter applicable to cohorts beginning up to March 2018.

The programs are registered in the e-MEC system by the Schools of FGV, and their certificates are valid nationwide.

Santa Catarina, December 12, 2025

IDE/FGV

I, Raphael Michels Fantinato de Moura, telephone number [415 425-2508](tel:4154252508), mailing address P.O. Box 90487, San Diego, CA 92169, certify that the professional translation of this document from Portuguese to English has been performed by myself, a qualified translator fluent in both languages, and that the following is an accurate and complete translation of the document.

Raphael Michels Fantinato de Moura.

Date: February 23, 2026.

DECLARAÇÃO DE CONCLUSÃO DE CURSO

Pós-Graduação Lato Sensu, Nível Especialização

Declaramos para os devidos fins que Antonio de Azevedo Donatti, CPF: 06160348906, concluiu o curso de Pós-Graduação lato sensu, nível especialização: MBA Executivo: Gestão com Ênfase em Gerenciamento de Projetos, iniciado em 20/06/2022 e finalizado em 19/08/2023, tendo cursado 432 horas-aula. O curso é oferecido pelas Escolas da FGV, por meio do Instituto de Desenvolvimento Educacional - IDE/FGV, possui a carga horária total de 432 horas-aula.

O curso de Pós-Graduação lato sensu, nível especialização: MBA Executivo: Gestão com Ênfase em Gerenciamento de Projetos, atendeu ao disposto na Resolução CNE/CES nº 01/2018 e Resolução CNE/CES 01/2007, esta última aplicável às turmas iniciadas até março/2018.

Os cursos são cadastrados no e-MEC pelas Escolas da FGV, e seus certificados têm validade nacional.

Santa Catarina, 12 de dezembro de 2025

IDE/FGV

Class/Cohort Information
Student: Antonio de Azevedo Donatti

Date of Birth: 12/27/1992

Place of Birth: Florianópolis / SC

Classroom Hours: 432.00 * **Workload completed and approved**
Partner Institution: FGVONLINE / FGV Online

Program: Executive MBA: Management with Emphasis in Project Management

Duration: 06/20/2022 to 08/19/2023

Class/Cohort: ONL022TS-EFPRJPA06T1

Cumulative GPA: 9.80

Course	Professor Responsible	Degree/Institution	Hours	Att.	Grade	Status
Argo – Alternate Reality Goal	Mary Kimiko Guimaraes Murashima	Doctorate Degree in Language Studies / Pontifical Catholic University of Rio de Janeiro	24	-	8.57	Passed
Corporate and Business Strategy	Murilo Ramos Alambert Rodrigues	Doctorate Degree in Business Administration / Rennes School of Business	24	-	10.00	Passed
Entrepreneurship and Innovation Management	Rafael Cuba Mancebo	Doctorate Degree in Business Administration / Puc – Rj	24	-	10.00	Passed
Marketing Strategies	Elson adalberto Teixeira	Master's Degree in Strategic Business Management / Federal Rural University of Rio de Janeiro	24	-	10.00	Passed
Project Management	Lorena Benchimol de Veloso	Master's Degree in Business Administration / European University – Lisbon	24	-	8.88	Passed
Scope and Quality Management	GUILHERME HOFFMANN	Master's Degree in International Marketing / National University of La Plata	24	-	10.00	Passed
Change and Stakeholder Management	ALMIRO DOS REIS NETO	Specialist in People Management / IAE – Université Lille III	24	-	10.00	Passed
Schedule and Cost Management	Ivaldo Monteiro da Silva	Specialist in Civil Engineering / Fluminense Federal University	24	-	9.88	Passed
Managing Projects and Products with Scrum	André Baptista Barcaui	Doctorate Degree in Business Administration / National University of Rosario	24	-	10.00	Passed
Corporate Finance	ANA TEREZA SCHLAEPFER SPINOLA	Master's Degree in Public Administration / Getulio Vargas Foundation	24	-	10.00	Passed
Leadership and Team Management	Adriana Bortolin	Master's Degree in Business Management / Catholic University of Santos	24	-	10.00	Passed
Business Economics	Fabricio Stocker	Doctorate Degree in Business Administration / University of São Paulo	24	-	10.00	Passed
Digital Transformation	Diana Sinclair Pereira Branisso	Doctorate Degree in Business Administration / Puc-rio	24	-	10.00	Passed
Project Feasibility Analysis	Nora Raquel Zygielszyper	Master's Degree in Economics / Pontifical Catholic University of Rio de Janeiro	24	-	0.00	Withdrawn

Project Risk Management	Luiz Fernando da Silva Xavier	Master's Degree in Business Administration / Fluminense Federal University	24	-	9.25	Passed
Trends in Project Management (ONL023QB-FGVEM04T01)	Alessandro Prudêncio Lukosevicius	Doctorate Degree in Civil Engineering / Fluminense Federal University	24	-	10.00	Passed
Project Procurement Management	Carlos Magno da Silva Xavier	Doctorate Degree in Business Administration / National University of Rosario	24	-	0.00	Withdrawn
Portfolio and PMO Management	Norberto de Oliveira Almeida	Doctorate Degree in Business Administration / Florida Christian University	24	-	10.00	Passed
Project Procurement Management (ONL023Z4-FGVEM06T03)	Gutenberg de Araújo Silveira	Academic Doctorate Degree in Business Administration with Emphasis in Management / University of Coimbra – Portugal	24	-	10.00	Passed
FGV Business Challenge	Paulo da Costa Lopes	Doctorate Degree in Production Engineering / Federal University of Santa Catarina	24	-	9.90	Passed
Capstone Project:						

This transcript does not replace the certificate of completion.

December 12, 2025.

Page: 2/2

I, Raphael Michels Fantinato de Moura, telephone number [415-425-2508](tel:415-425-2508), mailing address P.O. Box 90487, San Diego, CA 92169, certify that the professional translation of this document from Portuguese to English has been performed by myself, a qualified translator fluent in both languages, and that the following is an accurate and complete translation of the document.

Raphael Michels Fantinato de Moura.

Date: February 23, 2026.

Informações sobre a Turma

Aluno: Antonio de Azevedo Donatti
Naturalidade: Florianópolis / SC
Horas-aulas: 432,00 * **Carga horária cumprida e aprovada**
Conveniado: FGVONLINE / FGV Online
Curso: MBA Executivo: Gestão com Ênfase em Gerenciamento de Projetos
Duração: 20/06/2022 até 19/08/2023
Turma: ONL022TS-EFPRJPA06T1
Coefficiente de Rendimento: 9,80

Data de Nascimento: 27/12/1992

Disciplina	Docente Responsável	Titulação/Instituição	CH	Freq	Média	Situação
Argo – Alternate Reality Goal	Mary Kimiko Guimaraes Murashima	Doutor em Letras / Pontifícia Universidade Católica do Rio de Janeiro	24	-	8,57	Aprovado
Estratégia Corporativa e de Negócios	Murilo Ramos Alambert Rodrigues	Doutor em Administração / Esc Rennes School of Business	24	-	10,00	Aprovado
Empreendedorismo e Gestão da Inovação	Rafael Cuba Mancebo	Doutor em Administração de Empresas / Puc - RJ	24	-	10,00	Aprovado
Estratégias de Marketing	Elson adalberto Teixeira	Mestre em Gestão Estratégica de Negócios / Universidade Federal Rural do Rio de Janeiro	24	-	10,00	Aprovado
Gestão de Projetos	Lorena Benchimol de Veloso	Mestre em Administração de Empresas / European University - Lisboa	24	-	8,88	Aprovado
Gerenciamento do Escopo e Qualidade	GUILHERME HOFFMANN	Mestre em Marketing Internacional / Universidad Nacional de La Plata	24	-	10,00	Aprovado
Gerenciamento de Mudanças e Stakeholders	ALMIRO DOS REIS NETO	Especialista em Gestão de Pessoas / lae - Université Lille III	24	-	10,00	Aprovado
Gerenciamento de Cronograma e Custos	Ivaldo Monteiro da Silva	Especialista em Engenharia Civil / Universidade Federal Fluminense	24	-	9,88	Aprovado
Gerenciando Projetos e Produtos Com Scrum	André Baptista Barcaui	Doutor em Administração / Universidad Nacional de Rosario	24	-	10,00	Aprovado
Finanças Corporativas	ANA TEREZA SCHLAEPFER SPINOLA	Mestre em Administração Pública / Fundação Getulio Vargas	24	-	10,00	Aprovado
Liderança e Gestão de Equipes	Adriana Bortolin	Mestre em Gestão de Negócios / Universidade Católica de Santos	24	-	10,00	Aprovado
Economia dos Negócios	Fabricio Stocker	Doutor em Administração / Universidade de São Paulo	24	-	10,00	Aprovado
Transformação Digital	Diana Sinclair Pereira Branisso	Doutor em Administração de Empresas / Puc-rio	24	-	10,00	Aprovado
Análise de Viabilidade de Projetos	Nora Raquel Zygielszyper	Mestre em Economia / Pontifícia Universidade Católica do Rio de Janeiro	24	-	0,00	Trancado

Gerenciamento de Riscos em Projetos	Luiz Fernando da Silva Xavier	Mestre em Administração / Universidade Federal Fluminense	24	-	9,25	Aprovado
Tendências em Gerenciamento de Projetos (ONL023QB-FGVEM04T01)	Alessandro Prudêncio Lukosevicius	Doutor em Engenharia Civil / Universidade Federal Fluminense	24	-	10,00	Aprovado
Gerenciamento de Aquisições em Projetos	Carlos Magno da Silva Xavier	Doutor em Administração / Universidad Nacional de Rosario	24	-	0,00	Trancado
Gerenciamento de Portfólio e Pmo	Norberto de Oliveira Almeida	Doutor em Administração de Empresas / Florida Christian University	24	-	10,00	Aprovado
Gerenciamento de Aquisições em Projetos (ONL023Z4-FGVEM06T03)	Gutenberg de Araújo Silveira	Doutorado Acadêmico em Administração de Empresas Com Ênfase em Gestão / Universidade de Coimbra - Portugal	24	-	10,00	Aprovado
Fgv Business Challenge	Paulo da Costa Lopes	Doutor em Engenharia de Produção / Universidade Federal de Santa Catarina	24	-	9,90	Aprovado
Trabalho de Conclusão:						

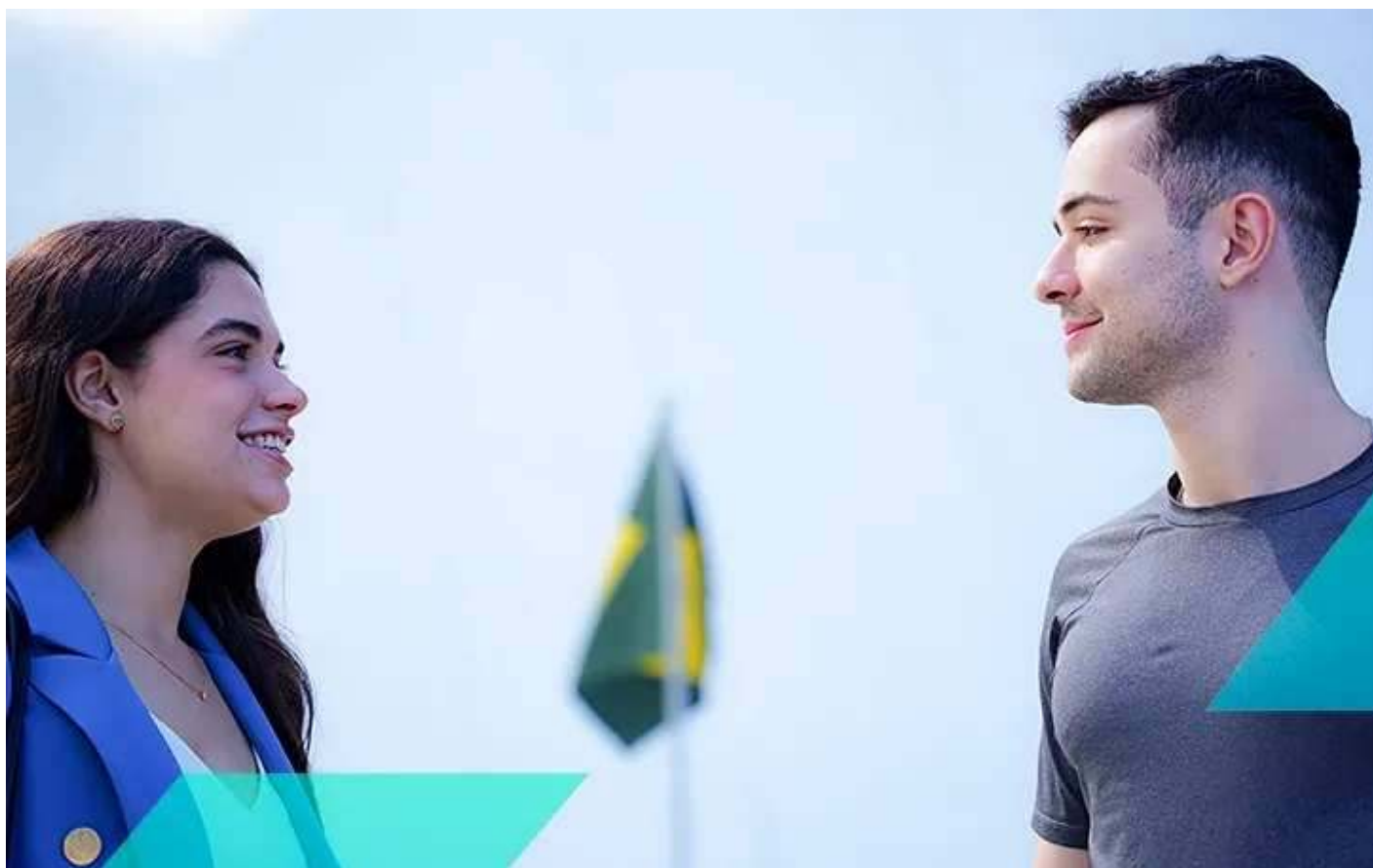
O presente histórico não substitui o certificado de conclusão de curso.

12 de Dezembro de 2025.

Página: 2/2

Who We Are

The Getulio Vargas Foundation is recognized for generating knowledge and economic and social development through education, research, consulting, and analysis of economic indicators , positioning itself as an innovative institution, both for its own community and for society in general.



Commitment to promoting national socioeconomic development.

The reliability of FGV's criteria and actions has been built over generations. This was only possible thanks to the commitment of political and business leaders, executives, researchers, and students who continually renew their trust in the institution's reputation and principles.

The Getulio Vargas Foundation, with its deep market knowledge, high academic competence, and international experience, has created a diversified offering that meets the needs of both the public and private sectors.



Our mission goes beyond teaching and research.

With a highly qualified faculty, strategic partnerships, and a global network of partner institutions, we positively impact the lives of individuals, organizations, and communities across the country.

This expansion reflects the institution's innovative vision, which seeks to align itself with market demands and trends, preparing professionals for the challenges of the contemporary world.

"The core of any FGV initiative, however, will always be one thing: Brazil and Brazilians."

Carlos Ivan Simonsen Leal - President of FGV

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FGV in Numbers



+110k

Undergraduate, graduate, and executive education students.

4.295

Intellectual outputs of professors, researchers, and technicians.

979

Technical consulting projects

443

Regular and completed studies and research.

*Data from 2024

FGV in the world

Ranked as the 3rd most important think tank in the world, FGV relies on academic cooperation agreements with renowned institutions worldwide, enabling research, joint projects, and the exchange of students and professors.

Ranked Programmes

The following programmes have been included in the FT Rankings.

Executive Education - Customised programmes

Ranked #79 in [Executive Education Custom 2025](#)

Executive Education - Open programmes

Ranked #27 in [Executive Education Open 2025](#)



Carnegie Evaluations LLC
315 East High Street, Bound Brook, New Jersey, 08805
Email: info@carnegieevaluations.com
Website: www.carnegieevaluations.com
Phone: (848)300-0099
Fax: (848) 300-5199

EVALUATION OF ACADEMICS

Carnegie Evaluations LLC, who specializes in the evaluation of foreign educational credentials, has prepared the following academic credential evaluation.

March 2, 2026

Name: **Mr. Antonio de AZEVEDO DONATTI**

Following is a description of Mr. Azevedo Donatti's foreign degree:

Institution: *Universidade Federal de Santa Catarina*
Degree: *Bacharel em Sistemas de Informacao*
Date of Award: March 2018
Years of Study: Four and a half
Country: Brazil

Institution: *Fundacao Getulio Vargas*
Degree: *Curso de Pos-Graduacao Lato Sensu, Especializacao: MBA Executivo: Gestao com Enfase em Gerenciamento de Projetos*
Date of Award: August 2023
Years of Study: One
Country: Brazil

Academic Equivalency in the United States

BACHELOR OF SCIENCE IN INFORMATION SYSTEMS

ONE YEAR OF GRADUATE STUDY IN BUSINESS ADMINISTRATION

Carnegie Evaluations LLC offers this evaluation after reviewing copies of the original diploma certificates and transcripts provided. This evaluation is advisory in nature and is based on the assumption that the submitted documents are accurate. There are no apparent grounds to disbelieve the authenticity and accuracy of the documentation presented on behalf of Mr. Antonio de Azevedo Donatti. In addition, this evaluation is based on standard scholarly and professional sources as referenced at the end of this document. Carnegie Evaluations LLC is not responsible for how this evaluation report will be used and is not responsible for damages resulting from such use of this report.

DISCUSSION OF MR. AZEVEDO DONATTI'S ACADEMICS

This credential evaluation is provided upon review of the degree certificates and transcripts awarded to Mr. Antonio de Azevedo Donatti during the course of his academic career. An analysis of Mr. Azevedo Donatti's foreign educational courses for the *Bacharel em Sistemas de Informacao* (translated as Bachelor of Information Systems) from *Universidade Federal de Santa Catarina* (translated as Federal University of Santa Catarina) and a *Curso de Pos-Graduacao Lato Sensu, MBA Executivo: Gestao com Enfase em Gerenciamento de Projetos* (translated as Lato Sensu Graduate Program, Executive MBA: Management with Emphasis in Project Management) from *Fundacao Getulio Vargas* (translated as Getulio Vargas Foundation) forms the basis for the following evaluation.

Mr. Azevedo Donatti graduated with a Bachelor of Information Systems degree from the Federal University of Santa Catarina in March 2018. The Federal University of Santa Catarina is an accredited institution of higher education in Florianopolis, Brazil. Admission to this program requires graduation from the US equivalent of high school and competitive entrance examinations for admission and enrollment. Mr. Azevedo Donatti satisfactorily completed the academic course requirements for the Bachelor of Information Systems program. He majored in Information Systems and was awarded a *Bacharel em Sistemas de Informacao* from the institute.

This is a four-and-a-half year undergraduate program of study that is equivalent to a degree of Bachelor of Science (B.S.) from an accredited institution of higher education in the United States. The academic criterion maintained by the Federal University of Santa Catarina is significantly similar to those parameters upheld by any other accredited colleges and universities in the United States.

The *Bacharel em Sistemas de Informacao* curriculum includes advanced bachelor's-level coursework and examinations in Mathematical Foundations of Computer Science, Introduction to Computer Science, Introduction to Object-Oriented Programming, Probability and Statistics, Behavioral Aspects of the Entrepreneur, General Systems Theory, Personal Marketing in Computer Science, Introduction to Administration, Idea Generation and Creativity in Computer Science, Economic and Financial Programming, Object-Oriented Systems Development, Organization, Systems and Methods, Data Structures, Computer Science and Society, Statistical Prediction Techniques, Strategic Management of Technologies, Information and Communication, Introduction to Innovation Management, Business Plan in Computer Science, Introduction to Symbolic Logic, Planning of Information and Knowledge Systems, Database, Computer Organization and Architecture, Systems Analysis and Design, Operating Systems, Software Engineering, Project Management, Introduction to Compilers, Parallel and Distributed Programming, Introduction to Projects, Data Warehouse, Web Programming, Computer Networks, Database Design, Usability Engineering, Intelligent Systems, Distributed Computing, Data Mining, Innovation Habitats, Introduction to Innovation Management, Administration and Management of Computer Networks, Information and Network Security, and other related subjects.

Thereafter, Mr. Azevedo Donatti completed a Lato Sensu Graduate Program, Executive MBA: Management with Emphasis in Project Management from Getulio Vargas Foundation in August 2023. Getulio Vargas Foundation is an accredited institution of higher education in Santa Catarina, Brazil. Admission to this program requires graduation from Bachelor level studies and competitive entrance examinations for admission and enrollment. Mr. Azevedo Donatti satisfactorily completed the academic course requirements for the Lato Sensu Graduate Executive MBA program. He majored in Management with Emphasis in Project Management and was awarded a *Curso de Pos-Graduacao Lato Sensu, MBA Executivo: Gestao com Enfase em Gerenciamento de Projetos* from the institute.

This is a one-year graduate program of study, which is substantially similar to the required coursework leading to completion of one year of Graduate-level studies from a regionally accredited University in the United States. The academic criterion maintained by Getulio Vargas Foundation is significantly similar to those parameters upheld by any other accredited colleges and universities in the United States.

The *Curso de Pos-Graduacao Lato Sensu, MBA Executivo: Gestao com Enfase em Gerenciamento de Projetos* curriculum includes advanced graduate-level coursework and examinations in Marketing Strategies, Project Management, Argo -Alternate Reality Goal, Corporate and Business Strategy, Entrepreneurship and Innovation Management, Scope and Quality Management, Change and Stakeholder Management, Schedule and Cost Management, Managing Projects and Products with Scrum, Corporate Finance, Leadership and Team Management, Business Economics, Digital Transformation, Project Feasibility Analysis, Project Risk Management, Trends in Project Management, Project Procurement Management, Portfolio and PMO Management, and other related subjects.

Upon reviewing Mr. Azevedo Donatti's academic history, it becomes apparent that Mr. Azevedo Donatti has satisfied the course work requirements, which are substantially similar and equivalent to those required for the completion of a four-year Bachelor's Degree and one year of graduate level program at an accredited institution of higher education in the United States.

SUMMARY

On the basis of the academic reputations of Federal University of Santa Catarina and Getulio Vargas Foundation, the nature and duration of the academic course work, and the grades attained in the courses, it is the judgment of Carnegie Evaluations LLC that Mr. Azevedo Donatti has attained the equivalent of a Bachelor of Science in Information Systems and one year of graduate study in Business Administration from an accredited institution of higher education in the United States.

Carnegie Evaluations LLC represents this evaluation report to be an accurate and correct evaluation to the best of its knowledge and belief, pursuant to the requirements of the Citizenship and Immigration Services of the United States Department of Homeland Security. Carnegie Evaluations LLC does not represent that the documentation submitted to it by anyone for evaluation meets the evidentiary standards of any state or federal agency or any court. This evaluation report, as are all such reports provided by Carnegie Evaluations LLC, is advisory for the customer who requested it.

The foregoing evaluation of Mr. Azevedo Donatti has been reviewed and approved by me, Dr. Zach G. Zacharia, on March 2, 2026.

Sincerely,



Zach G. Zacharia, Ph.D.
Director, Carnegie Evaluations LLC.
Associate Professor of Supply Chain Management
Director, Lehigh Center for Supply Chain Research
Lehigh University

Evaluation Resources:

1. World Higher Education Database. International Association of Universities' Worldwide Database of Higher Education Institutions, Systems and Credentials. www.whed.net.
2. AACRAO EDGE. AACRAO Electronic Database for Global Education. <https://www.aacrao.org/edge>
3. Central Intelligence Agency (CIA). The World Factbook. <https://www.cia.gov/the-world-factbook/>
4. ENIC-NARIC. European Network of Information Centers in the European Region, National Academic Recognition Information Centers in the European Union. www.enic-naric.net.

Bio: Professor Zach G. Zacharia

I am the Interim Department Chair, Decision and Technology Analytics (DATA) Department, an Associate Professor of Supply Chain Management, and Director of the Center for Supply Chain Research Lehigh in the College of Business and Economics, Lehigh University, where I teach Graduate and Undergraduate courses in Supply Chain Operations Management and Logistics and Transportation. In addition, I am also a visiting Professor at the Indian Institute of Technology (IIT) in New Delhi, India. I graduated with a B.S. in Mechanical Engineering from the University of Calgary, an MBA from the University of Alberta, and a Ph.D. in Logistics with a minor in Marketing from the University of Tennessee. My current research interests include Collaboration/Competition within the Supply Chain, Supplier Satisfaction, and the Physical Internet.

Before joining Academia, I worked at the University of Tennessee, Center for Transportation Research, for six years as an Associate Director. I also worked at the Department of Transportation in Alberta, Canada, for ten years as an Equipment Engineer. I am a principal in BZS Consulting, which primarily focuses on teaching Supply Chain Operations Management and evaluating collaboration and procurement strategies across firms in a supply chain.

I have developed significant international contacts and collaborations with many affiliate schools in several countries in Europe, Asia, and South America. I have evaluated numerous portfolios of international students from countries around the world and have performed in-depth assessments of how these foreign courses are equated to corresponding courses in the United States.

I have 29 refereed publications, including 2 articles in the *Journal of Operations Management*, 8 articles in the *Journal of Business Logistics*, and articles in *Decision Sciences*, the *Journal of Supply Chain Management*, *Industrial Marketing Management*, *International Journal of Production Research*, *International Journal of Production and Operations Management*, *International Journal of Logistics Management*, *Journal of Retailing*, *Journal of Business and Industrial Marketing*, *Marketing Management*, *Supply Chain Management Review*, *Journal of International Technology and Information Management*, *Journal of Vehicle Design* and *Wall Street Journal*. As a member of a Supply Chain Research Group at the University of Tennessee, I co-authored a book titled “*Supply Chain Management*” (Sage Publications, December 2000). I also contributed a chapter on logistics service providers and new product development in the book titled *Managing Innovation: The New Competitive Edge for Logistics Service Providers*, Stephan M. Wagner ed., Kuehne Foundation Book Series (2007).

Among the awards that I have received are the DATA Department Service Award (2023), Staub Faculty Excellence Award (2013) from the College of Business, Lehigh University, Best Paper Finalist (2010) from the *Journal of Operations Management*, Best Paper Award (2007) from NARTS and Best Dissertation Proposal Award (2000) from the University of Arkansas. As a member of a Supply Chain Research Group at the University of Tennessee, I coauthored a book titled *Supply Chain Management* (Sage Publications, December 2000).

A.**Biographical Information**

Zach G. Zacharia, Ph.D.
Interim Department Chair, Decision and Technology Analytics Department
Associate Professor Supply Chain Management
Director, Center for Supply Chain Management Lehigh
Supply Chain Management Program Director
Department of Management, College of Business Administration and Economics
Lehigh University, 621 Taylor Street, Bethlehem, PA, 18015
Office: (610) 758-4433, Fax: (610) 758-6941
zgz208@lehigh.edu

EDUCATION

- 1996 - 2001 **THE UNIVERSITY OF TENNESSEE** **Knoxville, TN**
Doctor of Philosophy in Business Administration
 - Major: Logistics, Minor: Marketing
 - Dissertation Title: An Analysis of the Effect of Logistics Involvement in Cross-functional Integrated New Product Development Projects (Advisor: Dr. John T. Mentzer)
- 1988 – 1993 **THE UNIVERSITY OF ALBERTA** **Edmonton, AB**
Master of Business Administration
- 1981 - 1985 **THE UNIVERSITY OF CALGARY** **Calgary, AB**
Bachelor of Science, Mechanical Engineering
- 1980 - 1981 **RED DEER COLLEGE** **Red Deer, AB**
Bachelor of Science
- 1979 – 1980 **THE UNIVERSITY OF ALBERTA** **Edmonton, AB**
Bachelor of Science

WORK EXPERIENCE SUMMARY

2016 – Present, Director, Center for Supply Chain Research Lehigh
2013 – Present, Associate Professor – Lehigh University
2008 – 2013 Assistant Professor – Lehigh University
2001 – 2008 Assistant Professor - Texas Christian University
1999 – 2001 Associate Director – Transportation Center, University of Tennessee
1997 – 1999 Assistant Director - Transportation Center, University of Tennessee
1995 – 1997 Senior Research Associate – University of Tennessee
1989 – 1995 Research Engineer – R&D Branch, Alberta Transportation & Utilities
1985 – 1989 Equipment Engineer – Alberta Transportation & Utilities

CONSULTING PROJECTS, EXECUTIVE EDUCATION

2023 Ecofriendly Behavior on Personal Transportation, AFIT, Dalton
2020 Financial Flow in SC, DiCentral, Houston

2020	Expert Witness – Real Estate Company, Bethlehem
2020	Lehigh University, Executive Education, Bethlehem
2019	Lehigh University, Executive Education, Bethlehem
2019	SC Collaboration in Drop Ship, DiCentral, Houston
2018	Coopetition in the Defense Industry, AFIT, Dayton
2018	IIT New Delhi, Executive Education, Delhi, India
2017	Lehigh University, Executive Education, Bethlehem
2016	IIT Madras, Global Initiative of Academic Networks, Chennai, India
2015	Morrison Executive Education, Santo Domingo, Dominican Republic
2014	CSCMP Executive Seminar, Bogota, Columbia
2012	Supply Chain Management Simulation, WAM Systems, Philadelphia
2010	Supply Chain Management Overview, Universidad de Piura, Peru
2007	Procurement of Capability Guidelines, Lockheed Martin Aeronautics
2002	Truck Safety Recommendations, University of Tennessee

B. Publications and Creative Activities

EDITORIAL ROLES (6)

- Senior Associate Editor- *International Journal of Logistics Management* (2018-current)
- Senior Editor- *Journal of Business Logistics* (2016- current)
- Special Issue Editor-(Physical Internet) - *Journal of Business Logistics* (2018-2020)
- Special Issue Editor- (Inter-Disciplinary Research) *Journal of Business Logistics* (2014-2015)
- Editorial Board Member – *Journal of Operations Management*
- Editorial Board Member –*Transportation Journal*
- Editorial Board Member – *Journal of Supply Chain Management*

DISSERTATION COMMITTEE MEMBER (2)

- Michael Plasch - *Supply Chain Collaboration - Investigating Motives, Drivers And Success Factors* – Johannes Kepler University Linz, Austria, 2021
- Kimberly K. Whitehead – *It's A Matter Of Give And Take: Exploring The Role Of Knowledge Transfer Within Supply Chain Collaboration* - University of Texas at Arlington, USA, 2014

BOOK CHAPTERS (5)

- **Zacharia, Zach G.** "Is there a role for Logistics Service Providers in New Product Development?" *Managing Innovation: The New Competitive Edge for Logistics Service Providers*, Stephan M. Wagner ed., Kuehne Foundation Book Series. Ch 7, 2008.
- Mentzer, John T., William J. DeWitt, James S. Keebler, Soonhong Min, Nancy W. Nix, Carlo D. Smith, and **Zach G. Zacharia**, "What is Supply Chain Management" *Supply Chain Management*, Thousand Oaks, CA: Sage Publications, Ch.1, 2000.
- **Zacharia, Zach G.**, "R&D and New Product Development in Supply Chain Management" *Supply Chain Management*, John T. Mentzer ed., Thousand Oaks, CA: Sage Publications, Ch.6, 2000.
- **Zacharia, Zach G.**, "The Evolution and Growth of Production in Supply Chain Management" *Supply Chain Management*, John T. Mentzer ed., Thousand Oaks, CA: Sage Publications, Ch.8, 2000.
- **Zacharia, Zach G.**, "The Evolution and Growth of Information Systems in Supply Chain Management" *Supply Chain Management*, John T. Mentzer ed., Thousand Oaks, CA: Sage Publications, Ch.11, 2000.

REFEREED PUBLICATIONS (29)

29. Varun Jain, Usha Mohan, Zach G. Zacharia, Nada R. Sanders (2022) "Improving patient satisfaction and outpatient diagnostic center efficiency using novel online real-time scheduling" *Operations Research for Health Care*, 32, 1-17, 100338
28. Saif Mir, Misty Blessley, **Zach Zacharia**, John Aloysius (2022) "Mending Fences in the Buyer-Supplier Relationship: The Role of Justice in Relationship Restoration" *Journal of Supply Chain Management*. Vol. 58, No. 3, 23 – 46.
27. Dev, Navin; Ravi Shankar; **Zach Zacharia**, Sanjeev Swami, (2021) "Supply chain resilience for managing the ripple effect in Industry 4.0 for green product diffusion" *International Journal of Physical Distribution & Logistics Management* Vol. 51 No. 8, 897-930.
26. Ballot, Eric, Benoit Montreuil, **Zach G. Zacharia**, (2021) "Physical Internet: First Results and Next Challenges" *Journal of Business Logistics* Vol 42 No. 1, 1 – 7.
25. Treiblmaier, Horst, Kristijan Mirkovski, Paul B. Lowry, **Zach G. Zacharia**, (2020) "The Physical Internet as a New Supply Chain Paradigm: A Systematic

- Literature Review and a Comprehensive Framework” *International Journal of Logistics Management* Vol. 31 No. 2, 239-287.
24. **Zach G. Zacharia**, Michael Plasch, Usha Mohan, Markus Gerschberger (2019) “The Emerging Role of Coopetition Within Inter-Firm Relationships” *International Journal of Logistics Management* Vol. 30, No. 2, 414-437.
 23. Soonhong Min, **Zach G. Zacharia**, Carlo D. Smith (2019) “Defining Supply Chain Management: In the Past, Present and Future” *Journal of Business Logistics* Vol. 40 No.1, 44-55.
 22. Kimberly Whitehead, **Zach Zacharia**, Edmund Prater (2019) “Investigating the Role of Knowledge Transfer in Supply Chain Collaboration” *International Journal of Logistics Management*” Vol. 30, No. 1, 284-302.
 21. Misty Blessly, Saif Mir, **Zach G. Zacharia**, John Aloysius (2018) “Breaching Relational Obligations In A Buyer-Supplier Relationship: Feelings Of Violation, Fairness Perceptions And Supplier Switching” *Industrial Marketing Management* Vol. 74, Oct, 215-226.
 20. Faraz, Alireza, Nada R. Sanders, **Zach G. Zacharia**, Markus Gerschberger (2018) “Monitoring Type B Buyer-Supplier Relationships” *International Journal of Production Research* Vol. 56, No. 18, 6225-6239.
 19. Whitehead, Kimberly, **Zach G. Zacharia**, Edmund Prater, (2016) “Absorptive Capacity Versus Distributive Capability: The Asymmetry of Knowledge Transfer” *International Journal of Operations and Production Management* Vol. 36, No 10, 1308-1332.
 18. Nada R. Sanders, Brian R. Fugate, **Zach G. Zacharia**, (2016) “Interdisciplinary Research In SCM: Through the Lens of The Behavioral Theory of The Firm” *Journal of Business Logistics* Vol. 37, No 2, 107-112.
 17. Nancy W. Nix, **Zach G. Zacharia**, (2014) “The Impact of Collaborative Engagement on Knowledge and Performance Gains in Episodic Collaborations” *International Journal of Logistics Management* Vol. 25, No 2, 245-269.
 16. **Zach G. Zacharia**, Nada R. Sanders, Brian R. Fugate (2014) “The Evolving Role of Disciplines Within Supply Chain Management” *Journal of Supply Chain Management* Vol. 50, No 1, 73-88.
 15. Nada R. Sanders, **Zach G. Zacharia**, Brian R. Fugate (2013) “The Interdisciplinary Future of Supply Chain Management Research” *Decision Sciences* Vol. 44, No. 3, 413-429.

14. Geoffrey T. Stewart, **Zach G. Zacharia**, Andrew B. Artis (2012) "Leveraging Relationship Orientation and its Impact on Relationship Outcomes" *Journal of Business and Industrial Marketing*, Vol. 27, No. 8, 644-658.
13. **Zach G. Zacharia**, Nancy W. Nix, Robert F. Lusch (2011) "Capabilities that Enhance Outcomes of an Episodic Supply Chain Collaboration" *Journal of Operations Management*, Vol. 29, No. 6, 591-603.
12. **Zach G. Zacharia**, Nada R. Sanders, Nancy W. Nix (2011) "The Emerging Role of the Third-Party Logistics Provider (3PL) as a Supply Chain Orchestrator" *Journal of Business Logistics*, Vol. 32, No. 1, 40-54.
11. Danny Lanier, Jr., William F. Wempe, **Zach G. Zacharia**, (2010) "Concentrated Supply Chain Membership and Financial Performance: Chain- and Firm-Level Perspectives" *Journal of Operations Management*, Vol.28, No.1, 1-16.
10. **Zach G. Zacharia**, Chad W. Autry, David S. Preston, Charles W. Lamb, (2009) "IT Alignment with Business Strategies in a Healthcare Organizations: An Empirical Analysis" *Journal of International Technology and Information Management*, Vol. 18, No. 3/4, 477-494.
9. **Zach G. Zacharia**, Nancy W. Nix and Robert F. Lusch, (2009) "An Analysis of Supply Chain Collaborations and Their Effect on Performance" *Journal of Business Logistics*, Vol. 30, No. 2, 101-123.
8. Chad W. Autry, **Zach G. Zacharia** and Charles W. Lamb, (2008) "A Logistics Strategy Taxonomy" *Journal of Business Logistics*, Vol. 29. No. 2, 53-74.
7. Nancy W. Nix, Robert F. Lusch, **Zach G. Zacharia**, and Wesley R. Bridges, (2008) "Competent Collaborations" *Marketing Management*, Vol. 17, No. 2, 18-24.
6. **Zach G. Zacharia** and John T. Mentzer (2007) "The Role of Logistics in New Product Development," *Journal of Business Logistics*, Vol. 28, No. 1, 83-110.
 - a. Reprinted in:
 - b. *Logistique and Management*, Vol. 16, No. 1, 35-53, (2008).
5. **Zach G. Zacharia** and John T. Mentzer (2004) "Logistics Salience In A Changing Environment," *Journal of Business Logistics*, Vol. 25, No. 1, 187-210.
 - a. Reprinted in:
 - b. *The ICFAI Journal of Supply Chain Management*, Vol. 3, No. 1, 53-72, (2006).

4. Mentzer, John T., William DeWitt, James S. Keebler, Soonhong Min, Nancy W. Nix, Carlo D. Smith, **Zach G. Zacharia** (2001) "Defining Supply Chain Management," *Journal of Business Logistics*, Vol. 22, No. 2, 1-25.
 - c. Reprinted in:
 - d. *Logistique and Management*, Vol. 9, No. 2, 3-19, (2001).
3. **Zacharia, Zach G.**, John E. Tidwell and Stephen H. Richards (2001) "An Overview of Truck and Bus Safety:1999 Knoxville Symposium," *Journal of Vehicle Design*, Vol. 26, No. 4, 442-453.
2. Mentzer, John T., Min Soonhong and **Zach G. Zacharia** (2000) "The Nature of Interfirm Partnering in Supply Chain Management," *Journal of Retailing*, Winter, Vol. 76, Issue 4, 549-568.
1. **Zacharia, Zach G.** and Bart Jennings (1998) "The Use of Active Participation and Group Competition to Facilitate Training and Technology Transfer for Adult Learners," *Transportation Research Record*, No. 1637, 13-18.

PAPERS UNDER REVIEW (2)

- Zach G. Zacharia, Scott C. Ellis, Saif Mir, Robert J. Trent - "Gaining Advantage Through Social Exchange: How and Under What Conditions" (Revise and Resubmit)
- Saif Mir, Timothy W. Breitbach, Zach G. Zacharia, Benjamin T. Hazen "Supplier Cultivation: An Accelerator Approach to Ecosystem Innovation" (Under Review)

NON - REFEREED PUBLICATIONS (5)

5. **Zach G. Zacharia** (2020), What Every CFO Needs to Know about Supply Chains
4. **Zach G. Zacharia** (2019), Supply Chain Collaboration in Transformative Vertical Industries (Implications of Omnichannel and Drop Shipping)
3. Robert J. Trent, **Zach G. Zacharia**, (2012) "The Wisdom of Becoming a Preferred Customer," *Supply Chain Management Review* Vol. 16, No. 6, 10-18.
2. Nix, W. Nancy, Robert F. Lusch, **Zach G. Zacharia**, and Wesley R. Bridges, (2007) "The Hand That Feeds You – What Makes Some Collaborations with Suppliers Succeed – When So Many Fail?" *The Journal Report- Business Insight* (A Joint Venture with MIT Sloan Management Review and Wall Street Journal), Dow Jones and Company

1. **Zacharia, Zach G.** (1994) “Expert System Simplifies Bridge Paint Maintenance Programs,” *Materials Performance*, June, 25 - 28.

CONFERENCE PROCEEDINGS (18)

18. **Zach Zacharia**, Timothy Breitbach, Ben Hazen, Saif Mir (2019) “Utilizing Accelerator Programs for adopting Innovations to Encourage the Adoption” *CSCMP Conference*, Anaheim, CA, September 15.
17. **Zach Zacharia**, Timothy Breitbach, Ben Hazen, Saif Mir (2018) “Utilizing Accelerator Programs to Encourage the Adoption of New Innovations in Large Organizations” *DSI Conference*, Chicago, IL, November 17.
16. Robert Weidmer, **Zach Zacharia**, (2018) “Competing Governance Mechanisms in Buyer-Supplier Relationships” *DSI Conference*, Chicago, IL, November 16.
15. **Zach Zacharia**, Michael Plasch, Usha Mohan, Markus Gerschberger (2017) “The Role of Coopetition in Buyer Supplier Relationships” *DSI Conference*, Washington, DC, November 18.
14. **Zach Zacharia**, Michael Plasch, Usha Mohan, Markus Gerschberger (2017) “Understanding the Antecedents and Outcomes of Coopetition” *CSCMP Academic Research Conference*, Atlanta, Georgia, September 24.
13. **Zach Zacharia**, Michael Plasch, Usha Mohan, Markus Gerschberger (2017) “The Evolving Role of Coopetition within the Supply Chain” *CSCMP European Research Seminar*, Barcelona, Spain, May 19.
12. Gouda, Sirish, **Zach Zacharia**, Haritha Saranga (2016) “Linking New Forms of Work Organization and External Integration: Mediating role of cross functional collaboration” *DSI Conference*, Austin, Texas, November 21.
11. Blessley, Misty, Saif Mir, ^[L]_[SEP] **Zacharia, Zach G.**, John Aloysius (2016) “The role of apologies following transgressions in buyer-supplier relationships.” *CSCMP Educator Conference*, Orlando, Florida, September 25.
10. Blessley, Misty, Saif Mir, ^[L]_[SEP] **Zacharia, Zach G.**, John Aloysius (2016) “The role of transactional and relational psychological contract breach in supplier switching behavior.” *CSCMP European Research Seminar*, Vienna, Austria, May 13.
9. Blessley, Misty, Saif Mir, ^[L]_[SEP] **Zacharia, Zach G.**, John Aloysius (2015) “Should I stay or should I go? The role of transactional and relational psychological contract breach in supplier switching behavior.” *CSCMP Educator Conference*, San Diego, California, September 27.
8. **Zacharia, Zach G.**, Nancy W. Nix and Robert F. Lusch (2007) “Supply Chain Collaborations: Project Performance and Business Performance” *18th North American Teaching and Research Conference*, Tempe, Arizona, March 29-31.

7. **Zacharia, Zach G.** (2005) “Team Based Learning in MBA and Undergraduate Supply Chain Management Classes” *16th North American Teaching and Research Conference*, Tempe, Arizona, March 17-19.
6. Nix, Nancy W., **Zach G. Zacharia** and Robert F. Lusch (2005) “Keys to Effective Supply Chain Collaboration” *16th North American Teaching and Research Conference*, Tempe, Arizona, March 17-19.
5. **Zacharia, Zach G.** and Marc E. Ruzicka (2003) “Experiential Learning: Live Business Cases in MBA Supply Management and Logistics Classes” *14th North American Teaching and Research Conference*, Tempe, Arizona, March 21- 23.
4. **Zacharia, Zach G** (2000) “The Evolution and Growth of Production in the Supply Chain”, *Society for Marketing Advances Conference*, Orlando, Florida, November 8-10.
3. **Zacharia, Zach G.**, John E. Tidwell and Stephen H. Richards (2000) “An Overview of Truck and Bus Safety:1999 Knoxville Symposium,” *4th International Fatigue Management Conference*, Perth, Australia, March 19-2.
2. **Zacharia, Zach G.** and Bart Jennings (1998), "The Use of Active Participation and Group Competition to Facilitate Training and Technology Transfer for Adult Learners," *Transportation Research Board Conference Proceedings*, Washington, District of Columbia, January 4-8.
1. **Zacharia, Zach G.** (1992), “Bridge Paint Expert Systems”, *Second International Organization for Economic Cooperation and Development (OECD) Conference on Knowledge Based Expert Systems in Transportation*, Montreal, Canada, April 3-7.

CONFERENCE PRESENTATIONS (3)

3. **Zach Zacharia**, (2022) “Identifying and Ranking Supply Chain Risks” *WDSI Conference*, Waikoloa, HI, April 7.
2. Annibal Sodero, **Zach Zacharia**, (2022) “Antecedents and outcomes of drop-shipping adoption in the retail supply chain” *Euroama Conference*, Berlin, July 3rd
1. Saif Mir, **Zach Zacharia**, (2022) “Risks in Procurement and Sourcing” *DSI Conference* Houston, November 21

PODCASTS (5)

- **Zacharia, Zach G.** (2021), “Red Flags in the Supply Chain” <https://business.lehigh.edu/blog/2021/zach-zacharia-red-flags-supply-chain> (July 2nd)
- **Zacharia, Zach G.** (2021), “Red Flags in the Supply Chain” <https://business.lehigh.edu/blog/2021/zach-zacharia-red-flags-supply-chain> (July 2nd)
- **Zacharia, Zach G.** (2021), “Disruptive New Paradigm of the Physical Internet” <https://business.lehigh.edu/blog/2021/zach-zacharia-disruptive-new-paradigm-physical-internet> (June 3rd)
- **Zacharia, Zach G.** (2018), “Dealing with Disruptive Innovations in the Supply Chain” (<https://cbe.lehigh.edu/blog/posts/dealing-disruptive-innovations-supply-chain>) (October 24)
- **Zacharia, Zach G.** (2017), “Drop Shipping: A New Opportunity for Retailers and Suppliers” (<https://cbe.lehigh.edu/blog/posts/drop-shipping-new-opportunity-retailers-and-suppliers>) December 11
- **Zacharia, Zach G.** (2017), “What You Need to Know About the Physical Internet” (<https://cbe.lehigh.edu/blog/posts/what-you-need-know-about-physical-internet>) (March 14) (Ranked 4th in Google Search for Physical Internet)

WORKING PAPERS (6)

- Zach Zacharia, Michael Plasch, Markus Gerschberger “Explorative and exploitative motives for coopetition” *Target: International Journal of Production Economics*
- Zach Zacharia, Annibal Sodero “Drop Shipping and its Effects on the New E-Commerce Retail Paradigm” *Target: Journal of Operations Management*
- Zach Zacharia, Robert Wiedmer, Kimberly Whitehead “Competing Governance Mechanisms in Buyer-Supplier Relationships” *Target: Journal of Operations Management*
- Zach Zacharia, Cedric Heuchenne, Nada Sanders, Faraz, Alireza “Comparison of populations based on binary characteristics in the presence of non-response” *Target: Production Operations Management Journal*

- Zach Zacharia, Gopal Kumar “Environmental and social performance leads to supply chain performance? An analysis in context of sustainable collaboration” *Target: Supply Chain Management: An International Journal*
- Zach Zacharia, Benjamin Hazen, Timothy Breitbach, Saif Mir “How Accelerator Programs Facilitate Innovation Adoption in Large Organizations” *Target: Journal of Operations Management*

27.Honors and Awards (25)

2023	DATA Department Service Award, Lehigh University
2018	Teaching Innovation Grant, CBE, Lehigh University
2018	Senior Associate Editor for <i>International Journal of Logistics Management</i>
2017	Best Reviewer Award <i>Journal of Business Logistics</i>
2016	Editor for <i>Journal of Business Logistics News</i>
2016	Associate Editor for <i>Production Operations Management</i> Special Issue
2015	Associate Editor for <i>Journal of Business Logistics</i>
2015	Member of the <i>Transportation Journal</i> Editorial Board
2013	Robert and Christine Staub Faculty Excellence Award
2012	Member of the <i>Journal of Supply Chain Management</i> Editorial Board
2011	Best Paper Finalist for 2010 (<i>Journal of Operations Management</i>)
2011	Best Paper Award (European DSI Conference)
2010-2011	Council of Supply Chain Management Professional Educator Conference Chair
2010	Member of the <i>Journal of Operations Management</i> Editorial Board
2010	Member of the <i>Journal of Business Logistics</i> Editorial Board
2009-2010	Supply Chain Management Educator Conference Proceedings Editor
2007-2008	Council of Supply Chain Management Case Editor
2007	Best Paper Award (<i>NARTS-ISM Conference</i>)
2006	Tied for highest SPOT (Student Perception of Teaching) score
2005	Highest SPOT (Student Perception of Teaching) in INSC department
2000	Doctoral Dissertation Proposal Award (<i>University of Arkansas</i>)
2000	Outstanding Student Paper Award (<i>Society for Marketing Advances</i>)
2000	Finalist (<i>ISBM Doctoral Dissertation Award</i>)
2000	Scholarly Research Grant Recipient (<i>University of Tennessee</i>)
1999, 1997	Fellow (<i>Council of Logistics Management Doctoral Symposium</i>)

28. Research Funding (16)

2019	DiCentral – SCM and Financial Flow Research \$20,000
2019	Ben Franklin Technology Partners and ESPI \$20,000
2018	AFIT – Managing Customer Driven Coopettition Projects \$25,000
2017	DiCentral – Drop Shipment Research \$20,000
2014-2015	International Travel Grant - One of 5 recipients selected across the entire University \$5000
2011	Faculty Research Grant – Lehigh University (Principal Investigator), Catherine Ridings (Lehigh University) “ Does investment in Supply Chain Management and Information Technology provide value for micro firms?” \$4500
2009	Summer Research Grant – College of Business and Economics, Lehigh University (Principal Investigator), Nada R. Sanders (Lehigh University, Brian S. Fugate (Colorado State University) “ <i>State of Supply Chain Management: A Visionary Perspective</i> ” \$3000
2002-2007	Charles Tandy American Enterprise Center Faculty Research Award (<i>Texas Christian University</i>) (\$10,000/yr)
2003, 05, 07	Junior Faculty Research Grant (<i>Institute of Supply Management</i>) (\$750/yr)
2005	Research Center for Teaching Excellence, Faculty Fellow Grant (<i>Texas Christian University</i>) (\$2500)

F. Scholarly Presentations (79)

- **Zacharia, Zach G.**, “*Supply Chain Collaboration in Transformative Vertical Industries*” Retail Value Chain Federation Conference, Teaneck, New Jersey, May 6, 2019
- **Zacharia, Zach G.**, “*Theoretical and Conceptual Foundations of Supply Chain Management*” PhD Research Seminar, Indian Institute of Technology, New Delhi, January India, January 25, 2018.
- **Zach Zacharia**, Michael Plasch, Usha Mohan, Markus Gerschberger “*The Role of Coopetition in Buyer Supplier Relationships*” DSI Conference, Washington, DC, November 18, 2017
- **Zacharia, Zach G.**, “*Utilizing Drop Shipment to Improve Your Bottom Line*” Retail Value Chain Federation Conference, Phoenix, Arizona, November 6, 2017
- **Zach Zacharia**, Michael Plasch, Usha Mohan, Markus Gerschberger “*Understanding the Antecedents and Outcomes of Coopetition*” CSCMP Academic Research Conference, Atlanta, Georgia, September 24, 2017

- **Zacharia, Zach G.**, “*Complexity in Supply Chain Management*” PhD Research Seminar, Atlanta, Georgia, September 23, 2017
- **Zacharia, Zach G.**, “*Coopetition Research*” PhD Research Seminar, Atlanta, September 22, 2017
- **Zacharia, Zach G.**, “*Buyer Supplier Relationships*” PhD Research Seminar, Atlanta, September 21, 2017
- **Zacharia, Zach G.**, “*Publishing Research in American Supply Chain Journals*” Indian Institute of Technology, New Delhi, India, July 21, 2017.
- **Zacharia, Zach G.**, “*Transforming Traditional Networks Through the Use of Collaborative Environments*” Supply Chain Leaders in Action Conference, Naples, Florida June 5, 2017
- **Zach Zacharia**, Michael Plasch, Usha Mohan, Markus Gerschberger (2017) “*The Evolving Role of Coopetition within the Supply Chain*” CSCMP European Research Seminar, Barcelona, Spain, May 19.
- **Zacharia, Zach G.**, “*Logistics PhD programs in the US panel session*” Logistics Doctoral Symposium, Auburn University, Auburn, February 24, 2017.
- **Zacharia, Zach G.**, “*A Research Journey*” Indian Institute of Technology, Trichy, India, February 6, 2017.
- **Zacharia, Zach G.**, “*Orientation and Firm Infrastructure*” PhD Research Seminar, Logistikum, University of Applied Sciences, Steyr, Austria January 12, 2017
- **Zacharia, Zach G.**, “*Strategy*” PhD Research Seminar, Logistikum, University of Applied Sciences, Steyr, Austria January 11, 2017
- **Zacharia, Zach G.**, “*Conceptual Foundations from Procurement and Operations*” PhD Research Seminar, Logistikum, University of Applied Sciences, Steyr, Austria January 10, 2017
- **Zacharia, Zach G.**, “*Conceptual Foundations from Marketing and Logistics*” PhD Research Seminar, Logistikum, University of Applied Sciences, Steyr, Austria January 9, 2017
- **Zacharia, Zach G.**, “*Theoretical and Conceptual Foundations of Supply Chain Management*” PhD Research Seminar, Logistikum, University of Applied Sciences, Steyr, Austria August 10, 2016

- **Zacharia, Zach G.**, “*Philosophy of Science*” PhD Research Seminar, Logistikum, University of Applied Sciences, Steyr, Austria August 9, 2016
- **Zacharia, Zach G.**, “*Conceptual Foundations of Marketing*” PhD Research Seminar, Logistikum, University of Applied Sciences, Steyr, Austria August 8, 2016
- **Zacharia, Zach G.**, “*Conceptual Foundations of Operations*” PhD Research Seminar, Logistikum, University of Applied Sciences, Steyr, Austria August 10, 2016
- Gouda, Sirish, **Zach Zacharia**, Haritha Saranga (2016) “Linking New Forms of Work Organization and External Integration: Mediating role of cross functional collaboration” *DSI Conference*, Austin, Texas, November 21.
- Blessley, Misty, Saif Mir,^[SEP] **Zacharia, Zach G.**, John Aloysius (2016) “The role of apologies following transgressions in buyer-supplier relationships.” *CSCMP Educator Conference*, Orlando, Florida, September 25.
- **Zacharia, Zach G.**, “*Increasing Efficiency and Reducing Cost within a Supply Chain*” Indian Institute of Technology, Madras, India, June 13 2016.
- Blessley, Misty, Saif Mir,^[SEP] **Zacharia, Zach G.**, John Aloysius (2016) “The role of transactional and relational psychological contract breach in supplier switching behavior.” *CSCMP European Research Seminar*, Vienna, Austria, May 13.
- Bleasley, Misty, Mir, Saif, **Zacharia, Zach G.**, Aloysius, John “*Should I stay or should I go? The role of transactional and relational psychological contract breach in supplier switching behavior*” Council of Supply Chain Management Educator Conference, San Diego, September 27, 2015.
- **Zacharia, Zach G.**, “*Qualitative and Quantitative Research Paths in SCM*” , University of Arkansas, Fayetteville, Arkansas Feb 27, 2015.
- **Zacharia, Zach G.**, “*Publishing Research in American Supply Chain Journals*” Indian Institute of Management, Bangalore, India, January 13, 2015.
- **Zacharia, Zach G.**, Scott Ellis, Robert J. Trent “*Gaining Advantage Through Social Exchange: How and Under What Conditions*” Production Operation Management Conference, Atlanta, Georgia, May 10, 2014.
- Ellis, Scott, **Zacharia, Zach G.**, Jae-Young Oh “*The Role of Functional Congruence in Cross-Functional and Inter-organizational Collaboration*” Decision Sciences Institute Conference, Baltimore, Maryland, November 19, 2013.

- **Zacharia, Zach G.**, “*Supply Chain Management, Collaboration and their Role Across Businesses and People*” Congress of Latin American Engineering Students, Lima, Peru, October 29, 2013.
- **Zacharia, Zach G.**, Scott Ellis, “*Antecedents to Buyer-Engineer Knowledge Transfer*” Production Operation Management Conference, Denver, Colorado, May 4, 2013.
- **Zacharia, Zach G.**, “*Balancing Effective Research and Teaching*” – Invited Panel Presentation, Council of Supply Chain Management Doctoral Symposium, Atlanta, Georgia, October 1, 2012.
- **Zacharia, Zach G.**, “*What are some of the Factors That Affect the Relationship Between Cross Functional New Product Development and New Product Project Performance?*” Decision Sciences Institute Conference, Boston, Massachusetts, November 22, 2011.
- **Zacharia, Zach G.**, “*Supply Chain Security - An Academic Discussion and Future Research*” Invited Panel Presentation, Decision Sciences Institute Conference, Boston, Massachusetts, November 21, 2011.
- **Zacharia, Zach G.**, “*Conference Chairperson Opening Remarks*” Council of Supply Chain Management Educator Conference, Philadelphia, Pennsylvania, October 2, 2011.
- **Zacharia, Zach G.**, William F. Wempe William and Danny Lanier, Jr. “*Concentrated Supply Chain Membership and Financial Performance: Chain- and Firm-Level Perspectives*” Academy of Management Conference, San Antonio, Texas, August 12 – August 17, 2011.
- **Zacharia, Zach G.** and Catherine M. Ridings “*Does investment in Supply Chain Management and Information Technology provide value for micro firms?*” Production Operations Management Conference, Reno, Nevada, April 28-May 1, 2011.
- **Zacharia, Zach G.** and Robert J. Trent “*Supplier Satisfaction and Innovation Sharing*” Decision Sciences Institute Conference, San Diego, November 20-23, 2010.
- Christoph Bode, Stephan M. Wagner and **Zacharia, Zach G.**, “*The Effect of Cooperation, Supplier Development, and Relationship-Specific Investments on Suppliers' Willingness to Share Innovation*” Decision Sciences Institute Conference, San Diego, November 20-23, 2010.

- **Zacharia, Zach G.** “*Personal Career Development in Academia: What now and How*” Council of Supply Chain Management Professionals Doctoral Symposium, San Diego, September 27, 2010.
- **Zacharia, Zach G.** “*Supply Chain Management Overview*” Executive MBA Program, Universidad de Piura, Piura, Peru, June 12, 2010.
- **Zacharia, Zach G.** “*Supply Chain Management Collaboration Strategies*” CSCMP Roundtable, Lima, Peru, June 11, 2010.
- **Zacharia, Zach G.** and John R. MacDonald “*Are differences in Risk Planning Significant?*” Production and Operations Management Conference, Vancouver, Canada, May 7-10, 2010.
- **Zacharia, Zach G.** and Robert J. Trent “*Supplier Satisfaction – How does it matter?*” Production and Operations Management Conference, Vancouver, Canada, May 7-10, 2010.
- **Zacharia, Zach G.,** Nancy W. Nix, and Robert F. Lusch “*The Moderating Role of Absorptive Capability and Collaborative Communication in Organizational Learning*” 19th North American Teaching and Research Conference, Tempe, Arizona, March 11-12, 2010
- **Zacharia, Zach G.** and John R. MacDonald “*Risk Planning: Is it of Value*” Decision Sciences Institute Conference, New Orleans, LA, November 17, 2009.
- **Zacharia, Zach G.** “*When Should New Product Development Managers Consider Distribution Logistics*” Decision Sciences Institute Conference, New Orleans, LA, November 15, 2009.
- John R. MacDonald and **Zacharia, Zach G.** “*Risk and Disruption Management: The Impact of Behavioral Interference*” Behavioral Operations Conference, Syracuse, NY, June 26, 2009.
- **Zacharia, Zach G.,** Nancy W. Nix, and Robert F. Lusch “*The Moderating Role of Absorptive Capability and Collaborative Communication in Organizational Learning*” Production and Operation Management Conference, Orlando, FL, May 2, 2009.
- **Zacharia, Zach G.,** Nancy W. Nix and Robert F. Lusch “*Supply Chain Collaborations: Project Performance and Business Performance*” 18th North American Teaching and Research Conference, Tempe, Arizona, March 29-31. (2007)

- **Zacharia, Zach G.**, Nancy W. Nix, and Robert F. Lusch “*The Moderating Role of Absorptive Capability and Collaborative Communication in Organizational Learning*” University of Tennessee, Knoxville, TN, November 7, 2006.
- **Zacharia, Zach G.**, Nancy W. Nix, and Robert F. Lusch “*The Moderating Role of Absorptive Capability and Collaborative Communication in Knowledge Acquisition*” DFWCSMP Roundtable meeting, Dallas, TX, October 12, 2006.
- **Zacharia, Zach G.**, “*Early Supplier Involvement*” National Council for Advanced Manufacturing, Washington, MD, June 7, 2006.
- **Zacharia, Zach G.**, Nancy W. Nix, and Robert F. Lusch “*Keys to Effective Supply Chain Collaboration and Knowledge Acquisition*” National Council for Advanced Manufacturing, Washington, MD, June 7, 2006.
- **Zacharia, Zach G.**, Nancy W. Nix, and Robert F. Lusch “*Keys to Effective Supply Chain Collaboration*” Supplier Network Working Group Meeting, Fort Worth, TX March 16, 2006.
- **Zacharia, Zach G.**, Nancy W. Nix, and Robert F. Lusch “*Keys to Effective Supply Chain Collaboration*” Institute of Supply Management Group Meeting, Fort Worth, Texas, January 3, 2006.
- **Zacharia, Zach G.** “Team Based Learning in MBA and Undergraduate Supply Chain Management Classes” *16th North American Teaching and Research Conference*, Tempe, Arizona, March 17-19. (2005)
- Nix, Nancy W., **Zach G. Zacharia** and Robert F. Lusch “Keys to Effective Supply Chain Collaboration” *16th North American Teaching and Research Conference*, Tempe, Arizona, March 17-19. (2005)
- **Zacharia, Zach G.**, “*Education Strategies*” Council of Logistics Roundtable Leadership Forum, Chicago, Illinois, June 11-12, 2004.
- **Zacharia, Zach G.**, and Nancy W. Nix, “*Supply Chain Collaboration – The role of a 3PL intermediary*” Society of Marketing Advances, New Orleans, Louisiana, November 6 - 8, 2003.
- **Zacharia, Zach G.**, Nancy W. Nix, and Robert F. Lusch “*Collaboration Effectiveness in the Supply Chain: A Knowledge and Capabilities Based Approach*” American Marketing Faculty Consortium, Dallas, Texas, October 30-November 2, 2003.
- **Zacharia, Zach G.**, “*What does it mean to be an education officer in your roundtable?*” Council of Logistics Roundtable Leadership Forum, Chicago, Illinois, June 6-7, 2003.

- Nix, Nancy W. and **Zach G. Zacharia**, Track Chairs “*Going Beyond the Hype: Getting and Measuring the Value from your Supply Chain Initiatives*” Council of Logistics Management Conference, Chicago, Illinois, September 23-27, 2003.
- **Zach G. Zacharia**, *Top 10 Truck Safety Recommendations*, Federal Motor Carrier Safety Administration, Washington, District of Columbia, October 16, 2002.
- **Zach G. Zacharia**, *Logistics Involvement in New Product Development*, University of Arkansas, Fayetteville, Arkansas, September 18, 2002.
- **Zach G. Zacharia**, “Supply and Value Chain Certificate Program” presented at the Supply and Value Chain Conference, Ft. Worth, Texas, February 8, 2002.
- **Zach G. Zacharia**, “*Tennessee Transportation Assistance Program*” presented at the Region 4 LTAP conference, St. Petersburg, Florida, May 16, 2001.
- **Zach G. Zacharia**, “*The Evolution and Growth of Production in the Supply Chain*”, 2000 *Society for Marketing Advances Conference*, Orlando, Florida, November 8, 2000.
- **Zach G. Zacharia**, and Soonhong Min “*The Nature of Interfirm Partnering in Supply Chain Management*” presented at American Marketing Association, Chicago, Illinois, August 5, 2000.
- **Zach G. Zacharia**, “*Searching the Internet and Web Page Design*” presented at University of Tennessee, Knoxville, Tennessee, April 17, 2000.
- **Zach G. Zacharia**, “*An Overview of Truck and Bus Safety: 1999 Knoxville Symposium*” presented at the 4th International Fatigue Management Conference, Perth, Australia, March 19 – 22, 2000.
- **Zach G. Zacharia**, “*Traffic Safety and the Internet*” presented at the Governor Highway Safety Conference, Memphis, Tennessee, July 12-14, 1999.
- **Zach G. Zacharia**, “*Tennessee Transportation Assistance Program*” presented at the Asphalt Emulsion Users Conference, Nashville, Tennessee, November 19, 1998.
- **Zach G. Zacharia** and Barton R. Jennings “*The Use of Active Participation and Group Competition to Facilitate Training and Technology Transfer for Adult Learners*” Transportation Research Board Conference, Washington, District of Columbia, January 10-14, 1998.
- **Zach G. Zacharia**, “*Training Requirements for Local Governments*” presented at the National Transportation Training Conference, Reno, Nevada, October 7-9, 1997.
- **Zach G. Zacharia**, “*Logistics Thought: Key Messages and Implications from the Field of Marketing*,” presented at the Council of Logistics Management Doctoral Symposium, Chicago, Illinois, October 3-4, 1997.

- **Zach G. Zacharia**, "*Navigating the Internet*" presented at the Southeast Local Roads Conference, Biloxi, Mississippi, September 24-26, 1997.
- **Zach G. Zacharia**, "*Bridge Paint Expert Systems*," presented at the Second International Organization for Economic Cooperation and Development (OECD) Conference on Knowledge Based Expert Systems in Transportation, Montreal, Canada, June 14-16, 1992.

G. Teaching and Research Advising

COURSES:

Lehigh University (2008 – Present)

- SCM 186 - Supply Chain Management and Operations (Undergraduate 2008 - present)
- SCM 354 - Logistics and Transportation (Undergraduate 2008-present)
- GBUS 453 – Logistics and Transportation (Graduate 2013 – present)
- GBUS 492- Supply Chain Management Strategy (Graduate 2010- 2015) (Summer Course)
- Advising 14 Supply Chain Management Majors (2021)
- Advising 11 Supply Chain Management Majors (2020)
- Advising 21 Supply Chain Management Majors (2019)
- Advising 5 Supply Chain Management Majors (2018)
- Advising 24 Supply Chain Management Majors (2017)
- Advising 9 Supply Chain Management Majors (2016)
- Advising 27 Supply Chain Management Majors (2015)
- Advising 28 Supply Chain Management Majors (2014)
- Advising 24 Supply Chain Management Majors (2013)
- Advising 9 Supply Chain Management Majors (2012)
- Advising 10 Supply Chain Management Majors (2011)
- Advising 13 Supply Chain Management Majors (2010)
- Advising 6 Supply Chain Management Majors (2009)

Texas Christian University (2001 – 2008)

- Strategic Sourcing and Procurement (Professional MBA) 2007
- Business Simulation (Professional MBA) 2007
- Supply Chain Management Concepts (Full-Time MBA) 2005 – 2008
- Supply Chain Management Concepts (Professional MBA) 2001– 2008
- Logistics and Transportation (Professional MBA) 2001 - 2008
- Supply Chain Tools and Technologies (Professional MBA) 2002
- Logistics and Transportation (Undergraduate) 2001 - 2008
- Supply Chain Management Concepts (Undergraduate) 2003 – 2004
- Supply Chain Tools and Technologies (Undergraduate) 2003
- Procurement and Supply Management (Undergraduate) 2003

University of Tennessee (1996-2001)

- Introduction to Transportation (Undergraduate) Summer 1998
- Introduction to Logistics (Undergraduate) Summer 1999
- Marketing Management (Undergraduate) Spring 2000
- Global Logistics and Transportation (Undergraduate) Summer 2000

H. SERVICE

University

Faculty Compensation Committee (2016 – 2019)

College

Director, Center for Supply Chain Research Lehigh
Promotion and Tenure Committee (2021 – onwards)
Chair, Database and Software Committee (2018 – onwards)
Ph.D. Task Force (2017)
Undergraduate Core Curriculum Committee (2016)
Math Committee to Assess Assessment Results (2010)

Department

BIS Assistant Professor Search Chair – Tenure Track (2021-2021)
SCM Assistant Professor Search Chair – Tenure Track (2020-2020)
DATA Department Chair Search – Tenure Track (2019-2019)
SCM Assistant Professor Search Chair – Tenure Track (2018-2018)
SCM POP Search Chair (2017-2017)
Research Seminar Committee (2010-2011)
SCM Club Faculty Liaison (2009-2019)

Professional (Council of Supply Chain Management Professionals)

Education Committee Member -Lehigh Valley Roundtable (2015-onwards)
President – Lehigh Valley Roundtable (2012-2015)
Education Conference Chair (2010 – 2011)
Education Strategies Committee Member (2007 – 3-year term)
Case Editor (3-year term)
President – Dallas Roundtable (2007-2008)
Vice President – Dallas Roundtable (2006-2007)
Education chair – Dallas Roundtable (2004-2006)
Member (1999 – onwards)

External Service

Rockefeller Group – Expert Service Consulting (Jan 2020)

Exhibit B - Eligibility Criteria: Professional Experience Records

PROFESSIONAL RECOMMENDATION LETTER

Florianópolis - Santa Catarina, January 7, 2026.

To Whom It May Concern,

This letter is issued by the Laboratório Bridge, a research and development laboratory integrated with the Technological Center (CTC) and the Health Sciences Center (CCS) of the Federal University of Santa Catarina (UFSC), a Brazilian federal public university registered under CNPJ No. 83.899.526/0001-82, dedicated to the development of innovative technological solutions aimed at public management and healthcare systems.

We hereby certify that Mr. Antonio de Azevedo Donatti performed professional activities on a full-time basis at the Laboratório Bridge from March 2014 to December 2017, initially serving as a Software Tester from March 2014 to April 2015, and subsequently as a Systems Analyst from May 2015 to December 2017.

During his tenure as a Software Tester, Mr. Donatti was responsible for execution of functional tests, validation of requirements, support for the identification and tracking of defects, and support for quality assurance activities prior to production releases, working in direct collaboration with the development teams.

In his role as a Systems Analyst, Mr. Donatti worked on technological projects focused on the public and healthcare sectors, performing requirements gathering and analysis, conduction of workshops with stakeholders, translation of business needs into technical specifications, backlog management, support for the execution of sprints in agile environments, definition of acceptance criteria, preparation of functional and technical documentation, and direct collaboration with development and quality teams to ensure secure, compliant, and timely deliveries.

We remain available for any additional clarifications.

Sincerely,



Lucas Postal

Project Supervisor | Legal Representative | Laboratório Bridge - UFSC

postal@bridge.ufsc.br / +55 48 9 9666-1990

I, Carolina Favero da Silva, telephone number 415 425-2508, mailing address P.O. Box 90487, San Diego, CA 92169, certify that the professional translation of this document from Portuguese to English has been performed by myself, a qualified translator fluent in both languages, and that the following is an accurate and complete translation of the document.



Date: March 2, 2026.

CARTA DE RECOMENDAÇÃO PROFISSIONAL

Florianópolis-SC, 07 de janeiro de 2026.

A quem possa interessar,

A presente carta é emitida pelo Laboratório Bridge, laboratório de pesquisa e desenvolvimento integrado ao Centro Tecnológico (CTC) e ao Centro de Ciências da Saúde (CCS) da Universidade Federal de Santa Catarina (UFSC), universidade pública federal brasileira, inscrita no CNPJ sob o nº 83.899.526/0001-82, dedicado ao desenvolvimento de soluções tecnológicas inovadoras voltadas à gestão pública e aos sistemas de saúde.

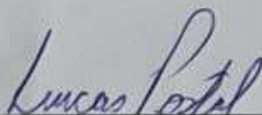
Certificamos que o Sr. Antonio de Azevedo Donatti exerceu atividades profissionais em regime de tempo integral junto ao Laboratório Bridge no período de março de 2014 a dezembro de 2017, atuando inicialmente como Tester de Software, de março de 2014 a abril de 2015, e posteriormente como Analista de Sistemas, de maio de 2015 a dezembro de 2017.

Durante sua atuação como Tester de Software, o Sr. Donatti foi responsável pela execução de testes funcionais, validação de requisitos, apoio à identificação e rastreamento de defeitos e suporte às atividades de garantia da qualidade antes das liberações para produção, atuando em colaboração direta com as equipes de desenvolvimento.

Na função de Analista de Sistemas, o Sr. Donatti atuou em projetos tecnológicos voltados aos setores público e de saúde, realizando levantamento e análise de requisitos, condução de workshops com stakeholders, tradução de necessidades de negócio em especificações técnicas, gestão de backlog, apoio à execução de sprints em ambientes ágeis, definição de critérios de aceite, elaboração de documentação funcional e técnica e colaboração direta com equipes de desenvolvimento e qualidade para garantir entregas seguras, aderentes e dentro dos prazos estabelecidos.

Permanecemos à disposição para quaisquer esclarecimentos adicionais.

Atenciosamente,



Lucas Postal

Supervisor de Projeto | Representante Legal | Laboratório Bridge - UFSC

postal@bridge.ufsc.br / +55 48 9 9666-1990

December 09th, 2025

To Whom It May Concern,

This letter is to certify that Mr. Antônio de Azevedo Donatti was employed on a full-time basis by E M S Ventura – Consultoria, Assessoria e Eventos Ltda, CNPJ 04.419.865/0001-48, headquartered in Florianópolis, Santa Catarina, Brazil, under the supervision of Ms. Norilene Vieira Reinert, for the following periods and positions:

- Project Coordinator – December 2017 to May 2018:

Overview: Supported software development cycles, facilitated cross-team communication, and ensured alignment between operational needs and project expectations;

- Project Manager – May 2018 to May 2021:

Overview: Led complex software and digital product initiatives, managed ERP integrations and cloud migrations, and improved delivery performance through agile management;

- Delivery Manager – May 2021 to the present date:

Overview: Directed delivery governance, oversaw multidisciplinary squads, optimized product roadmaps, and strengthened client communication and engagement.

Throughout his tenure with our organization, Mr. Donatti demonstrated professionalism, technical proficiency, and the ability to lead multidisciplinary teams in technology-driven environments. His performance consistently supported the company's operational growth, the enhancement of digital solutions, and the successful delivery of strategic initiatives.

Should you require any additional information regarding Mr. Donatti's employment or qualifications, please feel free to contact us.

Sincerely,

A large, stylized handwritten signature in blue ink, likely belonging to Norilene Vieira Reinert, is written over the signature line and extends across the contact information.

Norilene Vieira Reinert

Partner and Project Director

E M S Ventura – Consultoria, Assessoria e Eventos Ltda

+55 (48) 3223-9680

nori@emsventura.com.br

Exhibit C.I - First Prong - Substantial Merit and National Importance



IntellexIA
Health Technologies

BUSINESS PLAN

2026



Prepared by:
Nextus Plan

Contents

1.0 EXECUTIVE SUMMARY	3
1.1 Nature and Scope of the Business	5
1.2 Mr. Antonio de Azevedo Donatti's Expertise	6
2.0 THE COMPANY	8
2.1 Company's Targets	10
2.2 Need for the Company's Services	12
2.3 Company's Expansion	13
2.4 Company's Economic Benefits	14
2.4.1 Financial Highlights Chart	15
2.4.2 Federal, State and Payroll Taxes Chart	16
2.5 Summary of Investment	16
2.5.1 Startup Requirements Table	17
3.0 COMPANY'S SERVICES	18
4.0 INDUSTRY OVERVIEW	21
4.1 Industry Analysis	24
4.2 Major Market Segmentation	27
4.3 Business Location	30
5.0 STRATEGY AND IMPLEMENTATION	33
5.1 Swot Analysis	34
5.1.1 Strengths	34
5.1.2 Weaknesses	34
5.1.3 Opportunities	34
5.1.4 Threats	35
5.2 Website and Digital Marketing	35
5.3 Sales Strategy	36
5.4 Sales Forecast	37
5.4.1 Annual Sales Forecast Table	39
5.4.2 Annual Sales Chart	40
6.0 MANAGEMENT STRUCTURE	40
6.1 Staffing Requirements	40
6.2 Annual Personnel Plan Table	42
6.3 Five-Year Personnel Plan Table	42
6.4 Organizational Chart – Year 5	43
6.5 Duties and Responsibilities	43
7.0 FINANCIAL SUMMARY	45
7.1 Break-even Analysis	45
7.1.1 Break-even Analysis Chart	45
7.2 Profit and Loss Assumptions	46
7.2.1 Annual Profit and Loss Table	47
7.2.2 Annual Expenses x Sales Chart	48
7.2.3 Annual Profit Chart	48
7.3 Cash Flow Assumptions	49
7.3.1 Annual Cash Flow Table	50
7.3.2 Annual Net Cash Flow and Cash Balance Chart	51
7.4 Balance Sheet Assumptions	51
7.4.1 Annual Balance Sheet Table	53
8.0 MR. ANTONIO DE AZEVEDO DONATTI'S NATIONAL-LEVEL IMPACT	53
9.0 INDIRECT JOBS CREATION - ECONOMIC POLICY INSTITUTE	56
9.1 Distressed Communities	58
APPENDIX	1

1.0 Executive Summary

IntellexIA Health Technologies will be established by Mr. Antonio de Azevedo Donatti as a healthcare technology company focused on transforming the acquisition, management, and governance of Implants and Medical Devices (IMD) within the United States healthcare system. The company will be headquartered in Naples, Florida, and will operate through a scalable, cloud-based SaaS platform designed to support hospitals, health insurance providers, and integrated healthcare networks.

The company's core solution is a centralized digital platform that integrates data standardization, regulatory compliance, pricing intelligence, and operational workflow management into a unified system. This approach addresses critical inefficiencies in the current U.S. healthcare procurement environment, where fragmented systems, inconsistent data, and limited transparency contribute to cost variability, compliance risks, and operational inefficiencies.

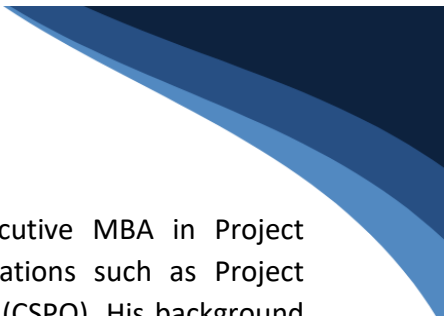
IntellexIA Health Technologies will enable healthcare organizations to manage the full lifecycle of medical device procurement, from supplier qualification and regulatory validation to surgical workflow coordination and post-procedure auditing. By providing real-time data insights, standardized device information, and audit-ready processes, the platform enhances decision-making, strengthens governance, and reduces unnecessary costs across the surgical supply chain.

The company will adopt a Software-as-a-Service (SaaS) model supported by secure cloud infrastructure, allowing for scalable deployment across multiple healthcare organizations in different regions of the United States. Initial operations will focus on platform development, market validation, and early client acquisition, followed by structured expansion as demand increases and partnerships are established within the healthcare ecosystem.

Founder Background

Mr. Antonio de Azevedo Donatti is a technology and HealthTech specialist with extensive experience in software development, project management, and digital transformation within regulated healthcare environments. His professional trajectory includes leadership roles in complex technology initiatives involving healthcare providers, system integrations, and large-scale operational platforms.

He has led multidisciplinary teams and managed end-to-end product development cycles, including the design and implementation of solutions focused on data integration, process automation, and operational efficiency. His experience includes working on healthcare-related systems requiring regulatory alignment, interoperability, and structured data governance, directly supporting the type of platform proposed in this business plan.



Mr. Donatti holds a degree in Information Systems and an Executive MBA in Project Management, complemented by internationally recognized certifications such as Project Management Professional (PMP) and Certified Scrum Product Owner (CSPO). His background uniquely positions him to lead the development and scaling of IntellexIA Health Technologies, particularly in environments that require a combination of technical expertise, regulatory awareness, and strategic execution.

Alignment with U.S. National Priorities

IntellexIA Health Technologies directly aligns with key U.S. national priorities related to healthcare cost reduction, regulatory compliance, supply chain transparency, and digital transformation. The U.S. healthcare system continues to face significant challenges associated with rising costs, fragmented procurement processes, and lack of standardization in medical device management.

By introducing a platform that standardizes IMD data, enhances pricing transparency, and strengthens compliance oversight, the company contributes to improving operational efficiency and reducing unnecessary expenditures across hospitals and healthcare organizations.

The proposed solution supports broader national objectives, including:

- **Strengthening healthcare cost control and operational efficiency through data-driven procurement practices**, aligned with federal efforts led by the Centers for Medicare & Medicaid Services (CMS) to reduce administrative burden and improve operational efficiency through interoperability and automation initiatives.¹
- **Enhancing regulatory compliance and auditability across the medical device supply chain**, consistent with oversight conducted by the U.S. Food and Drug Administration (FDA), which establishes strict quality, safety, and compliance requirements for medical devices and their lifecycle management.²
- **Promoting interoperability and integration of healthcare systems**, directly aligned with the CMS Interoperability and Patient Access Final Rule, which requires the implementation of APIs and standardized data exchange to improve accessibility and coordination across healthcare stakeholders.³
- **Supporting the modernization of healthcare infrastructure through scalable digital solutions**, in line with recent CMS regulations such as the Interoperability and Prior

¹ <https://www.cms.gov/policies-technology-interoperability-burden-reduction>

² <https://www.fda.gov/medical-devices/device-advice-comprehensive-regulatory-assistance/quality-and-compliance-medical-devices>

³ <https://www.cms.gov/priorities/burden-reduction/overview/interoperability/policies-regulations/cms-interoperability-patient-access-final-rule-cms-9115-f>

Authorization Final Rule, which emphasizes improving electronic health data exchange and streamlining administrative processes through technology.⁴

- **Advancing data transparency and reducing inefficiencies in healthcare operations,** consistent with federal initiatives aimed at improving data availability, reducing duplication of services, and enabling more informed decision-making across healthcare systems.⁵

These priorities reflect a national mandate to improve the efficiency, transparency, and sustainability of healthcare delivery in the United States. By addressing systemic inefficiencies in one of the most cost-sensitive areas of healthcare, medical device procurement, IntellexIA Health Technologies contributes to both economic and public health outcomes at a national level, while directly supporting ongoing federal efforts to modernize healthcare infrastructure, strengthen compliance, and enhance data-driven decision-making across the healthcare ecosystem.

1.1 Nature and Scope of the Business

IntellexIA Health Technologies, led by Mr. Antonio de Azevedo Donatti, will operate as a healthcare technology company headquartered in Naples, Florida, focused on the standardization, governance, and optimization of the acquisition and management of Implants and Medical Devices (IMD) within the United States healthcare system. The company will provide a cloud-based Software-as-a-Service (SaaS) platform designed to improve transparency, regulatory compliance, and operational efficiency across the medical device procurement lifecycle.

IntellexIA Health Technologies' scope of services centers on enabling healthcare organizations to manage the full lifecycle of medical device procurement, from supplier qualification and regulatory validation to surgical workflow coordination and post-procedure auditing. By standardizing device data, ensuring regulatory compliance, and providing real-time pricing intelligence, the platform allows healthcare organizations to reduce cost variability, mitigate compliance risks, and improve operational control across surgical and procurement processes.

Core Service Offerings

1. **IMD Data Standardization and Centralized Device Database:** IntellexIA Health Technologies will provide a structured and standardized database of medical devices, including normalized product descriptions, manufacturer information, and supplier data. This service eliminates inconsistencies, reduces duplication, and ensures data integrity across healthcare organizations.

⁴<https://www.cms.gov/priorities/burden-reduction/overview/interoperability/policies-regulations/cms-interoperability-prior-authorization-final-rule-cms-0057-f>

⁵ <https://www.cms.gov/newsroom/fact-sheets/interoperability-and-patient-access-fact-sheet>

2. **Supplier Qualification and Regulatory Compliance Management:** The platform will enable healthcare organizations to register, evaluate, and continuously monitor suppliers based on U.S. regulatory standards, including FDA compliance requirements. Automated validation and audit mechanisms will ensure that all suppliers and devices meet applicable legal and safety standards.
3. **Pricing Intelligence and Cost Benchmarking:** IntellexIA Health Technologies will deliver regionalized pricing intelligence tools that allow hospitals and insurers to analyze price variations, benchmark procurement costs, and identify inefficiencies. This service promotes transparency and supports more effective negotiation and cost control strategies.
4. **End-to-End Procurement and Surgical Workflow Management:** The platform will manage the entire procurement lifecycle, including quotation processes, authorization workflows, surgical planning, and post-procedure validation. This ensures traceability, operational efficiency, and alignment between procurement, clinical, and financial processes.
5. **Billing Validation and Audit-Ready Documentation:** IntellexIA Health Technologies will support billing validation processes by ensuring that all transactions, device usage, and supplier invoices are compliant with healthcare regulations. The platform will generate audit-ready documentation, reducing disputes and improving financial governance.
6. **Analytics and Decision Support Dashboards:** The company will provide advanced analytics dashboards that offer insights into cost performance, compliance status, supplier performance, and operational efficiency. These tools enable data-driven decision-making across procurement and clinical operations.
7. **Integration and Implementation Support Services:** IntellexIA Health Technologies will offer integration services to connect its platform with existing hospital systems, including ERPs, billing systems, and clinical platforms. Implementation support and ongoing technical consulting will ensure seamless adoption and scalability.

By focusing on data standardization, regulatory compliance, and procurement transparency within the medical device supply chain, IntellexIA Health Technologies directly contributes to national priorities related to healthcare cost reduction, operational efficiency, and system-wide transparency. The company's approach supports the modernization of healthcare infrastructure and strengthens governance across one of the most complex and cost-sensitive areas of the U.S. healthcare system.

1.2 Mr. Antonio de Azevedo Donatti's Expertise

Mr. Antonio de Azevedo Donatti is a highly experienced technology and HealthTech professional with a strong background in software development, product management, and large-scale digital transformation initiatives within regulated environments. His career demonstrates a progressive trajectory from technical roles in software quality assurance and systems analysis to



leadership positions in project management, product strategy, and delivery governance, with a particular focus on healthcare technology solutions.

Over the course of his career, Mr. Donatti has developed extensive expertise in managing complex technology ecosystems, leading multidisciplinary teams, and delivering high-impact digital platforms for healthcare providers, hospitals, and health system operators. His experience spans the full lifecycle of technology projects, including requirements gathering, system architecture definition, agile development, deployment, and post-implementation optimization.

Mr. Donatti has played a critical role in the design and implementation of healthcare solutions focused on operational efficiency, process automation, and data governance. His work includes the development of platforms for medical device traceability (OPME), technovigilance systems, and analytics dashboards that support healthcare providers in managing complex procurement and compliance workflows. These experiences are directly aligned with the core objectives of IntellexIA Health Technologies, particularly in relation to standardization, auditability, and transparency within the medical device supply chain.

In his leadership roles, Mr. Donatti has successfully managed large-scale projects involving hundreds of professionals, including a complex healthcare system implementation for a national healthcare operator, where he coordinated multidisciplinary teams across technical, operational, and strategic functions. His ability to oversee large teams, manage budgets, and ensure delivery within regulated environments demonstrates his capacity to lead scalable and mission-critical initiatives in the healthcare sector.

Additionally, Mr. Donatti has extensive experience in system integration and interoperability, having led projects involving integration with major enterprise systems such as SAP, TOTVS, MV, and Benner. These integrations were executed using modern technologies, including APIs, webhooks, and structured data formats (JSON/XML), ensuring traceability, compliance, and seamless data exchange across healthcare platforms.

His expertise also includes cloud infrastructure and modernization initiatives, where he directed programs focused on migrating systems to cloud environments such as AWS and Google Cloud. These projects involved implementing secure, scalable architectures, optimizing performance, and reducing operational costs, all of which are critical capabilities for the successful deployment of a SaaS-based healthcare platform like IntellexIA Health Technologies.

Mr. Donatti is highly skilled in agile methodologies, including Scrum and Kanban, and has extensive experience in backlog management, stakeholder engagement, and continuous improvement practices. He has led product discovery initiatives, defined product roadmaps, and translated regulatory and business requirements into actionable development plans for technical teams. His ability to bridge technical, regulatory, and business domains is a key differentiator in the successful execution of complex HealthTech solutions.

Throughout his career, Mr. Donatti has consistently delivered measurable results, including improving operational efficiency, reducing rework, increasing customer satisfaction, and enhancing service delivery performance. He has also contributed to revenue growth by developing structured pricing and customization models, demonstrating both technical and commercial acumen.

Academically, Mr. Donatti holds a degree in Information Systems from the Federal University of Santa Catarina and an Executive MBA in Project Management from Fundação Getulio Vargas. He also holds internationally recognized certifications, including Project Management Professional (PMP) and Certified Scrum Product Owner (CSPO), which further validate his expertise in project execution, product development, and agile leadership.

His professional experience includes direct collaboration with public sector healthcare initiatives, including projects developed in coordination with Brazil's Ministry of Health, where he contributed to interoperability initiatives and the implementation of systems with national-level impact. This experience demonstrates his ability to operate in highly regulated environments and deliver solutions that align with public policy objectives and large-scale healthcare systems.

Overall, Mr. Donatti's combination of technical expertise, leadership experience, and deep understanding of healthcare operations positions him uniquely to lead IntellexIA Health Technologies. His background in developing scalable, compliant, and data-driven healthcare solutions directly supports the company's mission to modernize and optimize the medical device procurement ecosystem in the United States.

2.0 The Company

IntellexIA Health Technologies will operate as a healthcare technology company headquartered in Naples, Florida, specializing in the standardization, governance, and optimization of the acquisition and management of Implants and Medical Devices (IMD) within the United States healthcare system.

To support these activities, IntellexIA Health Technologies will maintain a multidisciplinary organizational structure that scales progressively in alignment with product development, client acquisition, and platform adoption. The company's staffing strategy prioritizes technical development, regulatory expertise, and customer success functions in the early stages, followed by expansion in commercial and operational roles as the business grows.

Organizational Structure

The company's workforce will include the following key positions over the five-year planning horizon:

- **1 General Manager and Head of Product and Technology – Mr. Antonio de Azevedo Donatti:** Responsible for overall company leadership, product strategy, platform

architecture, regulatory alignment, and operational oversight. Mr. Donatti will focus on strategic decision-making, product evolution, and stakeholder engagement, while technical execution is carried out by the engineering and product teams.

- **2 Software Engineers:** Responsible for developing and maintaining the platform's backend and frontend systems, including APIs, user interfaces, and core functionalities related to procurement workflows, compliance validation, and system integration.
- **3 Data Analysts / Data Engineers:** Responsible for structuring, processing, and analyzing large datasets related to medical devices, pricing, and supplier performance. These professionals will develop data pipelines, ensure data integrity, and support analytics dashboards and decision-making tools.
- **2 Regulatory & Compliance Specialists:** Responsible for ensuring that the platform and all associated processes comply with U.S. healthcare regulations, including FDA-related requirements and industry standards. They will oversee supplier validation, audit mechanisms, and regulatory updates.
- **2 Product Managers:** Responsible for defining product roadmap, prioritizing features, aligning technical development with market needs, and ensuring that the platform delivers value to healthcare organizations.
- **3 Customer Success / Support Specialists:** Responsible for onboarding clients, providing technical support, ensuring platform adoption, and maintaining long-term relationships with healthcare organizations.
- **4 Sales and Business Development Managers:** Responsible for client acquisition, strategic partnerships, contract negotiation, and expansion across hospitals, insurers, and healthcare networks.
- **1 Administrative and Operations Support Specialist:** Responsible for internal operations, financial coordination, documentation management, and general administrative support.

By Year 5, IntellexIA Health Technologies is projected to employ approximately 18 professionals, reflecting a lean and scalable organizational structure designed to support a SaaS-based business model. This structure enables the company to efficiently develop and deliver its platform while maintaining flexibility and cost control during its growth phase.

The company's operational model is designed to ensure that strategic leadership remains focused on product innovation, regulatory alignment, and market expansion, while technical execution, client support, and business development are handled by specialized personnel. This approach supports sustainable growth, operational efficiency, and the successful deployment of a scalable healthcare technology platform within the United States.

2.1 Company's Targets

IntellexIA Health Technologies will focus on healthcare organizations that face structural challenges related to cost control, procurement inefficiencies, lack of pricing transparency, and increasing regulatory complexity in the acquisition and management of Implants and Medical Devices (IMD).

Primary Market Focus

1. Hospitals and Hospital Networks

The company's primary target market consists of hospitals and hospital networks that manage high volumes of surgical procedures and medical device procurement. These organizations often operate with fragmented procurement systems, inconsistent pricing structures, and limited visibility into supplier performance.

IntellexIA Health Technologies will support these organizations by delivering:

- Standardized medical device data and centralized procurement management
- Supplier qualification and regulatory compliance validation
- Real-time pricing intelligence and benchmarking tools
- End-to-end workflow management from quotation to post-procedure audit
- Data-driven insights to improve cost control and negotiation

This segment benefits directly from improved cost transparency, reduced variability in procurement, and enhanced regulatory compliance.

2. Health Insurance Companies and Managed Care Organizations

Health insurers and managed care organizations represent a key target segment due to their need to control costs, validate claims, and ensure compliance in surgical procedures involving medical devices.

IntellexIA Health Technologies will support these organizations by providing:

- Audit-ready procurement and billing validation workflows
- Cost benchmarking and pricing intelligence tools
- Fraud and overpricing risk reduction through data standardization
- Improved visibility into surgical device utilization

These services enable insurers to reduce unnecessary expenditures and improve financial governance.

3. Integrated Delivery Networks (IDNs) and Value-Based Care Organizations

Healthcare systems operating under integrated and value-based care models require greater control over costs, standardization, and operational efficiency.

IntellexIA Health Technologies will support these organizations by offering:

- Cross-facility standardization of device data and procurement processes
- Centralized governance and compliance tracking
- Performance analytics across multiple facilities
- Improved alignment between clinical, operational, and financial workflows

This segment benefits from increased operational efficiency and alignment with cost-containment strategies.

Secondary Market Focus

4. Surgical Centers and Specialty Care Providers

Ambulatory surgical centers and specialty providers also require structured procurement processes and compliance oversight.

IntellexIA Health Technologies will provide:

- Scalable procurement workflows adapted to smaller facilities
- Supplier validation and compliance monitoring
- Cost benchmarking and operational insights

5. Healthcare Purchasing Groups and Procurement Organizations

Organizations involved in group purchasing and supply chain management represent a secondary opportunity.

IntellexIA Health Technologies will support these entities by delivering:

- Data standardization across multiple providers
- Pricing intelligence at regional and national levels
- Enhanced governance and transparency in procurement practices

Geographic Focus and Growth Strategy

IntellexIA Health Technologies will initially operate in Naples, Florida, leveraging the region's healthcare infrastructure and proximity to growing hospital networks. Following market validation, the company will expand into additional U.S. regions with high healthcare expenditure and demand for cost optimization solutions.

Long-Term Strategy and Vision

IntellexIA Health Technologies aims to establish itself as a specialized provider of procurement intelligence, compliance, and governance solutions within the healthcare sector by:

- Expanding partnerships with hospitals and insurers
- Scaling its SaaS platform across multiple healthcare systems
- Enhancing pricing transparency and regulatory compliance nationwide
- Supporting cost reduction initiatives in the U.S. healthcare system

2.2 Need for the Company's Services

The demand for IntellexIA Health Technologies' services is driven by structural inefficiencies within the United States healthcare system, particularly in the procurement and management of medical devices.

Healthcare organizations face several persistent challenges:

- **Lack of pricing transparency:** Medical device pricing varies significantly across providers, often without standardized benchmarks, leading to unnecessary cost inflation.⁶
- **Fragmented procurement processes:** Hospitals and insurers rely on disconnected systems, spreadsheets, and manual workflows, resulting in inefficiencies, delays, and increased operational risk.⁷
- **Regulatory complexity and compliance risks:** Medical device procurement must comply with strict FDA and industry regulations, yet many organizations lack structured tools to ensure continuous compliance and audit readiness.⁸
- **Limited data standardization:** Inconsistent naming conventions and duplicated records create confusion, reduce negotiation power, and increase administrative burden.
- **Inefficient surgical workflow coordination:** Lack of integration between procurement, clinical operations, and billing processes leads to errors, delays, and financial discrepancies.⁹
- **Rising healthcare costs and pressure for cost containment:** Hospitals and insurers are under increasing pressure to reduce costs while maintaining quality and compliance.¹⁰

IntellexIA Health Technologies addresses these challenges by delivering a centralized SaaS platform that standardizes data, ensures regulatory compliance, enhances pricing transparency, and integrates procurement workflows.

By focusing on one of the most cost-sensitive areas of healthcare, medical device procurement, the company provides measurable value through cost reduction, operational efficiency, and improved governance.

⁶ <https://acenth.com/blog/an-overview-of-medical-device-pricing-reimbursement-and-economic-impact/>

⁷ <https://www.bmcoder.com/blog/how-disconnected-hospital-systems-create-operational-bottlenecks>

⁸ <https://www.fda.gov/medical-devices/device-advice-comprehensive-regulatory-assistance/quality-and-compliance-medical-devices>

⁹ <https://www.graphiteconnect.com/blog/healthcare-procurement-strategy>

¹⁰ <https://www.aha.org/press-releases/2025-04-30-new-aha-report-hospitals-and-health-systems-squeezed-persistent-economic-challenges>

2.3 Company's Expansion

IntellexIA Health Technologies will be structured for scalable and sustainable growth, aligned with increasing demand for data-driven procurement, regulatory compliance, and operational efficiency solutions in the healthcare sector.

Service Expansion

The company's service portfolio will evolve as the platform matures and adoption increases. Key expansion areas include:

- Advanced pricing intelligence models and predictive cost analytics
- Expanded compliance and audit automation capabilities
- Integration with additional hospital systems, ERPs, and billing platforms
- Enhanced analytics dashboards for multi-facility organizations
- Consulting services for procurement optimization and system integration

Geographic Expansion

Following initial operations in Florida, the company plans to expand into key healthcare markets, including:

- Florida (statewide expansion)
- Texas (Houston, Dallas, Austin)
- Southeast U.S. (Georgia, North Carolina)
- Additional metropolitan healthcare hubs

Team and Capability Growth

Hiring will occur in phases, aligned with the company's growth trajectory:

- Early stage: engineering, data, and compliance
- Mid stage: customer success and sales
- Growth stage: expansion of product, analytics, and operations

This approach ensures controlled scaling and operational efficiency.

Strategic Partnerships

IntellexIA Health Technologies will pursue partnerships with:

- Healthcare systems and hospital networks
- Cloud infrastructure providers
- Healthcare technology integrators

- Regulatory and compliance advisors

These partnerships will support platform adoption and expansion.

Investment in Innovation

The company will continuously invest in:

- Data standardization frameworks
- Pricing intelligence models
- Compliance automation systems
- Scalable cloud infrastructure

Through this structured expansion strategy, IntellexIA Health Technologies will position itself as a specialized provider of healthcare procurement intelligence and compliance solutions, contributing to cost reduction, transparency, and operational efficiency across the U.S. healthcare system.

2.4 Company's Economic Benefits

IntellexIA Health Technologies is projected to generate significant economic benefits during its first five years of operation, supported by a scalable Software-as-a-Service (SaaS) business model and increasing demand for data-driven procurement, regulatory compliance, and pricing intelligence solutions within the United States healthcare system.

In its first year of operations, IntellexIA Health Technologies is projected to generate approximately \$515,000 in revenue, reflecting initial client adoption among hospitals, healthcare networks, and health insurance organizations. As the company expands its platform capabilities, client base, and geographic presence, annual revenues are expected to grow consistently, reaching approximately \$3,103,187 by Year 5. This growth trajectory demonstrates the scalability of the company's platform and its ability to address critical inefficiencies in the medical device procurement ecosystem.

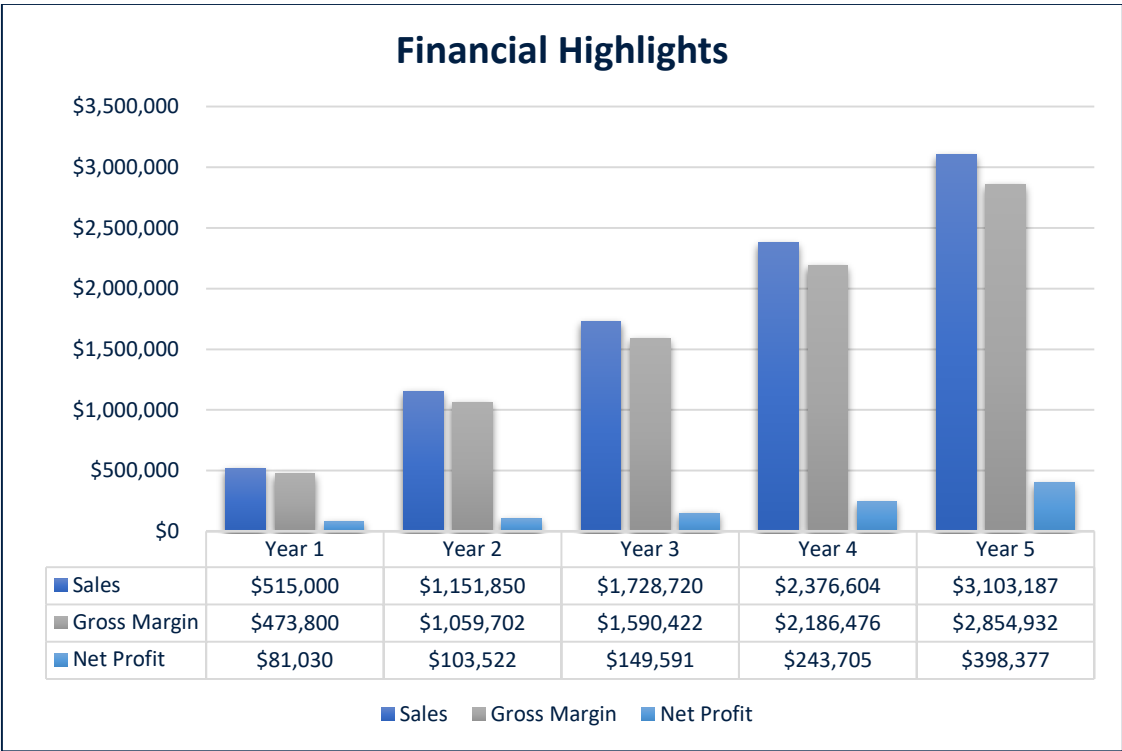
Gross margin is projected to scale proportionally with revenue, increasing from approximately \$473,800 in Year 1 to \$2,854,932 by Year 5. These margins reflect the efficiency of the company's SaaS-based delivery model, which enables recurring revenue generation, low marginal cost of service expansion, and strong operational leverage as the platform scales. The company's focus on high-value services such as data standardization, compliance automation, and pricing intelligence further supports sustainable margin growth.

Net profitability is also expected to increase steadily over the five-year period. IntellexIA Health Technologies is projected to generate approximately \$81,030 in net profit in Year 1, growing to approximately \$398,377 by Year 5. This reflects a disciplined approach to cost management, phased hiring, and strategic reinvestment in technology development, regulatory capabilities, and market expansion.

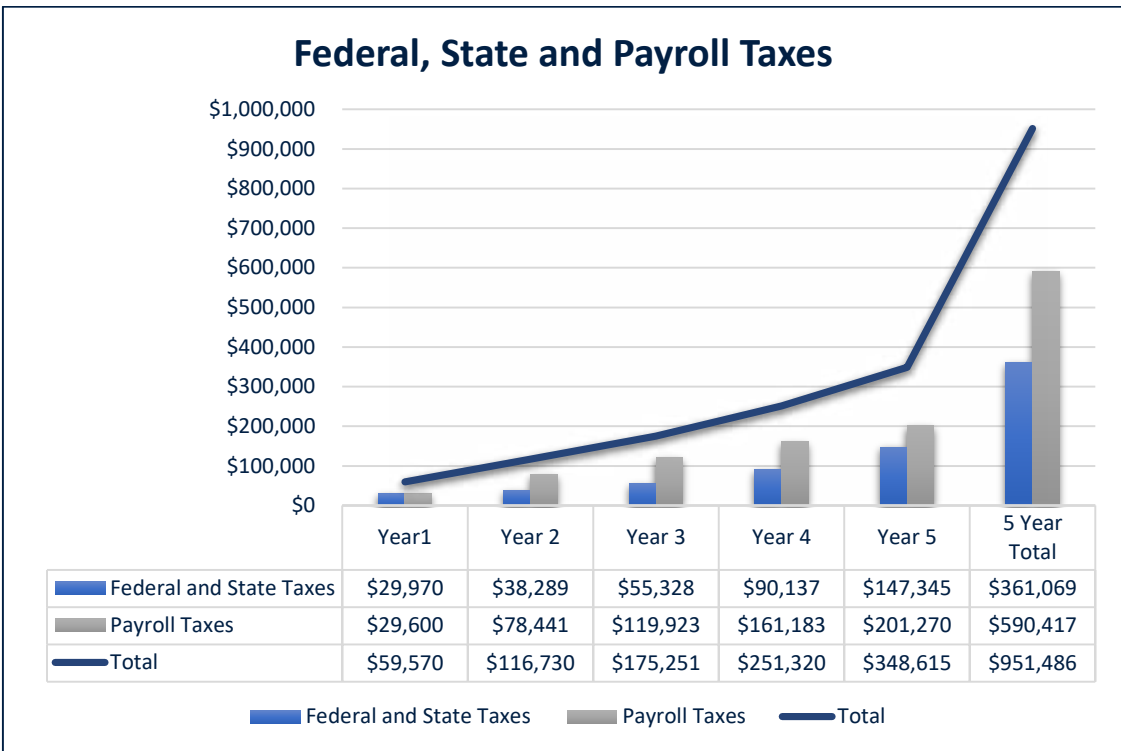
In addition to direct financial performance, the company is expected to generate meaningful fiscal contributions to federal and state governments. Total tax contributions, including corporate income taxes and payroll-related taxes, are projected to grow from approximately \$59,570 in Year 1 to \$348,615 by Year 5, resulting in an estimated \$951,486 in cumulative tax contributions over five years. These contributions support public funding for healthcare programs, infrastructure, and workforce development initiatives.

Under the leadership of Mr. Antonio de Azevedo Donatti, IntellexIA Health Technologies is positioned to generate sustained economic value while supporting national priorities related to healthcare cost containment, operational efficiency, regulatory compliance, and the modernization of healthcare infrastructure across the United States.

2.4.1 Financial Highlights Chart



2.4.2 Federal, State and Payroll Taxes Chart



2.5 Summary of Investment

IntellexIA Health Technologies will require an initial investment of approximately \$48,000 to launch its operations and establish a solid foundation for the development and deployment of its healthcare technology platform focused on the management and governance of Implants and Medical Devices (IMD). This initial capital allocation has been carefully structured to support operational readiness, early product development, and market entry during the company’s initial stage.

Startup expenses are projected to total approximately \$35,000, covering the essential costs required to establish a functional and scalable Software-as-a-Service (SaaS) platform. These expenses include \$2,500 in legal and business formation costs, ensuring proper company registration, contractual structuring, and regulatory alignment.

An allocation of \$7,500 will be dedicated to regulatory and compliance consulting, which is critical given the company’s focus on medical device governance and alignment with U.S. healthcare regulations, including FDA-related requirements.

To support the development and deployment of the platform, \$5,000 will be invested in cloud infrastructure and hosting, ensuring a secure, scalable, and reliable environment for system operations. Additionally, \$5,000 will be allocated to software tools and licenses, supporting development, data management, and system integration activities.

IntellexIA Health Technologies will also invest \$3,500 in integration and testing environments, enabling the validation of platform functionalities, interoperability capabilities, and workflow automation prior to client deployment.

Marketing and business development activities will receive an allocation of \$8,000, supporting initial client acquisition, brand positioning, and outreach to hospitals, healthcare organizations, and insurers.

Administrative and operational costs are projected at \$3,500, covering essential business operations, coordination activities, and initial support functions.

In addition to startup expenses, the company will maintain approximately \$13,000 in cash reserves, providing working capital to support early-stage operations, manage short-term expenses, and ensure financial flexibility during the initial phase of client acquisition and platform deployment.

The total initial investment of \$48,000 reflects a lean and capital-efficient business model, leveraging the founder's extensive technical expertise to minimize upfront costs while focusing resources on core platform development, regulatory alignment, and early market validation. This approach enables IntellexIA Health Technologies to establish a strong operational foundation while maintaining flexibility for future scaling, investment, and expansion.

2.5.1 Startup Requirements Table

Startup	
Requirements	
Startup Expenses	
Legal & Business Formation	\$2,500
Regulatory & Compliance Consulting	\$7,500
Cloud Infrastructure & Hosting (Year 1)	\$5,000
Software Tools & Licenses	\$5,000
Integration & Testing Environment	\$3,500
Marketing & Business Development (Initial)	\$8,000
Administrative & Operational Costs	\$3,500
Total Startup Expenses	\$35,000
Startup Assets	
Cash Required	\$13,000
Startup Inventory	\$0
Other Current Assets	\$0
Long-term Assets	\$0
Total Assets	\$13,000
Total Requirements	\$48,000

3.0 Company's Services

IntellexIA Health Technologies' services address critical inefficiencies in the healthcare supply chain, particularly the lack of transparency, fragmented data systems, inconsistent pricing structures, and regulatory complexity associated with medical device procurement and utilization. By centralizing and structuring these processes, IntellexIA Health Technologies enables hospitals, healthcare networks, and insurers to improve decision-making, reduce costs, and ensure compliance with federal and industry regulations.

1. IMD Data Standardization and Digital Catalog Management

IntellexIA Health Technologies will provide a centralized and standardized digital repository for implants and medical devices, enabling healthcare organizations to manage product data in a structured and interoperable format.

This service includes:

- Development of standardized data models for IMDs
- Classification and normalization of device attributes (manufacturer, specifications, regulatory status, pricing benchmarks)
- Creation of a unified digital catalog accessible across departments and facilities
- Elimination of duplicate or inconsistent product records
- Integration with hospital ERP and procurement systems

This capability allows healthcare providers to improve inventory visibility, reduce procurement errors, and establish a consistent data foundation for decision-making and compliance.

2. Regulatory Compliance and Audit Management Platform

The company will offer integrated compliance and audit tools designed to support adherence to U.S. healthcare regulations governing medical devices, including traceability, documentation, and supplier validation.

Key functionalities include:

- Supplier qualification and credential verification workflows
- Device traceability and lifecycle tracking
- Automated compliance checks aligned with FDA and healthcare regulatory requirements
- Digital audit trails for procurement and utilization processes
- Risk monitoring and alert systems for non-compliant devices or suppliers

This service reduces regulatory exposure, improves audit readiness, and strengthens governance across the medical device supply chain.

3. Pricing Intelligence and Cost Optimization Engine

IntellexIA Health Technologies will provide advanced pricing intelligence tools that enable healthcare organizations to benchmark, analyze, and optimize the cost of medical devices.

This includes:

- Regional and national pricing benchmarks for IMDs
- Identification of pricing variations across suppliers and contracts
- Cost analysis dashboards for surgical procedures and device utilization
- Negotiation support through data-driven insights
- Detection of overpricing, inefficiencies, and cost leakage

By increasing pricing transparency, this service supports significant cost savings and enhances financial control for hospitals and payers.

4. Procurement Workflow Optimization and Supplier Management

The platform will streamline and optimize the end-to-end procurement process for medical devices, from supplier onboarding to post-procedure reconciliation.

Core components include:

- Digital procurement workflows and approval processes
- Supplier performance tracking and evaluation
- Contract management and pricing agreement monitoring
- Integration with purchasing and supply chain systems
- Automation of ordering, validation, and reconciliation processes

This service reduces administrative burden, improves procurement efficiency, and ensures alignment between clinical, financial, and operational teams.

5. Surgical Utilization Tracking and Post-Procedure Audit

IntellexIA Health Technologies will enable detailed tracking of device utilization during surgical procedures, supporting both operational control and financial accuracy.

Capabilities include:

- Real-time or near-real-time tracking of devices used in procedures
- Post-procedure validation of device usage against billing and procurement data
- Identification of discrepancies between planned and actual utilization
- Support for billing accuracy and reimbursement validation

- Data collection for performance analysis and clinical cost management

This service enhances transparency and ensures alignment between procurement, clinical use, and financial reporting.

6. Data Integration and Interoperability Services

The company will provide integration capabilities that connect its platform with existing healthcare IT systems, ensuring seamless data exchange and operational continuity.

This includes:

- Integration with hospital ERP systems, EHRs, and supply chain platforms
- API-based connectivity and secure data exchange protocols
- Data synchronization across multiple facilities and departments
- Interoperability with payer systems and external data sources
- Standardization aligned with healthcare interoperability frameworks

This service eliminates data silos and supports coordinated, system-wide decision-making.

7. SaaS Platform Licensing and Subscription Model

IntellexIA Health Technologies will deliver its services through a subscription-based SaaS model, providing flexible and scalable access to its platform.

Key elements include:

- Tiered subscription plans based on organization size and service scope
- Modular access to platform functionalities (compliance, pricing, procurement, analytics)
- Cloud-based deployment with high availability and security standards
- Continuous platform updates and feature enhancements
- Technical support and system maintenance

This model enables predictable revenue generation while allowing clients to scale usage based on operational needs.

8. Implementation, Training, and Ongoing Support Services

To ensure successful adoption and long-term value, the company will provide structured implementation and support services.

These include:

- System onboarding and configuration tailored to client operations
- Training programs for administrative, procurement, and clinical teams

- Change management support for process adoption
- Ongoing technical support and customer success management
- Performance monitoring and optimization recommendations

These services ensure effective platform utilization and maximize return on investment for clients.

The integrated nature of IntellexIA Health Technologies' services positions the company not merely as a software provider, but as a critical infrastructure layer within the healthcare supply chain ecosystem.

By addressing inefficiencies in one of the most cost-sensitive areas of healthcare, medical device procurement and utilization, the company contributes to:

- Cost containment across healthcare systems
- Increased transparency and accountability
- Improved regulatory compliance
- Enhanced operational efficiency in surgical environments

4.0 Industry Overview

IntellexIA Health Technologies operates within the intersection of the U.S. healthcare industry, the medical device market, and the healthcare supply chain technology sector. These industries are characterized by rapid growth, increasing complexity, and rising demand for digital solutions that improve efficiency, transparency, and cost control.

The United States healthcare system is the largest in the world, with total healthcare expenditures exceeding \$5.3 trillion in 2024, representing approximately 18% of the U.S. GDP.¹¹ This scale creates significant opportunities for technology-driven solutions that address inefficiencies, particularly in high-cost operational areas such as procurement and medical device management.

U.S. Healthcare Industry Analysis

The U.S. healthcare sector continues to experience sustained growth driven by demographic trends, increased prevalence of chronic diseases, and rising demand for advanced medical technologies. Healthcare spending has grown consistently, reaching nearly \$4.9 trillion in 2023, with continued upward pressure expected in the coming years.¹²

¹¹<https://www.cms.gov/data-research/statistics-trends-and-reports/national-health-expenditure-data/nhe-fact-sheet>

¹²<https://www.ama-assn.org/about/ama-research/trends-health-care-spending>

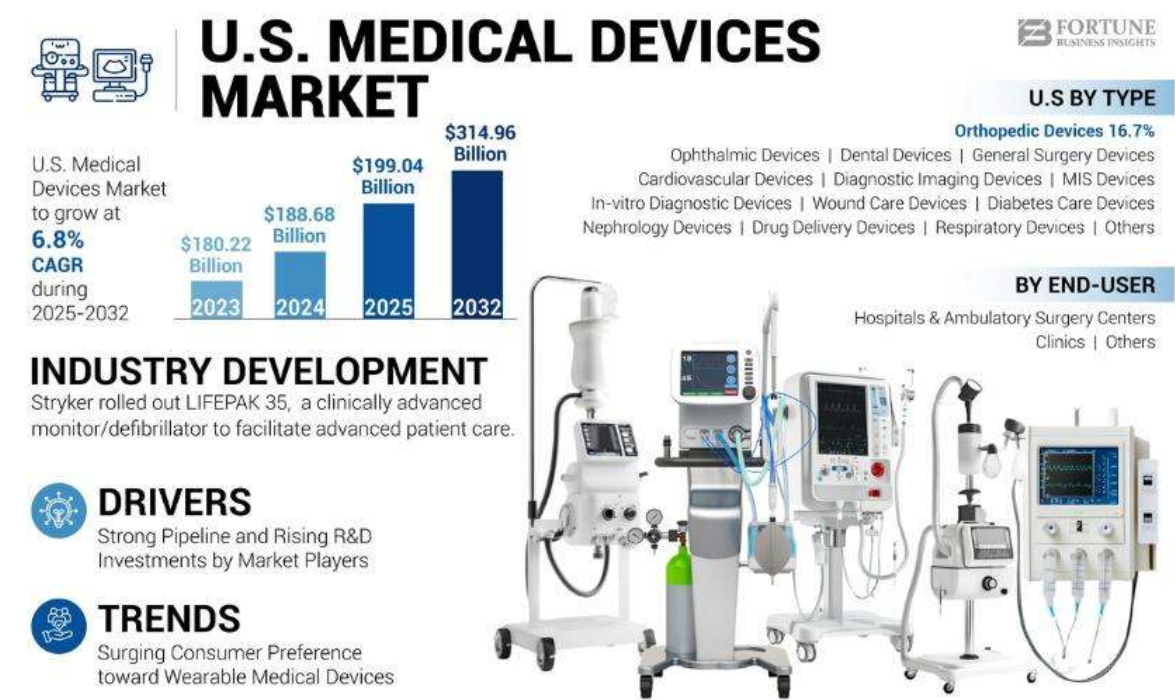
Despite this growth, the system faces structural inefficiencies, including fragmented data systems, high administrative costs, and lack of pricing transparency. These inefficiencies contribute significantly to overall healthcare expenditures and create demand for solutions that improve coordination, standardization, and operational efficiency.

Medical Devices Market

The medical device sector represents a critical component of healthcare delivery and a major cost driver within the system. In the United States, the medical devices market was valued at approximately \$188.68 billion in 2024 and is projected to reach over \$314 billion by 2032, reflecting strong and sustained growth.¹³

Medical devices account for approximately 4% to 6% of total U.S. healthcare spending, highlighting their significant impact on overall healthcare costs.

Globally, the medical devices market is expected to exceed \$1.2 trillion by 2035, driven by technological advancements, increased surgical procedures, and the expansion of digital health solutions.



This growth reinforces the importance of efficient procurement, pricing control, and regulatory compliance in managing healthcare expenditures.

¹³ <https://www.fortunebusinessinsights.com/u-s-medical-devices-market-107009>

Healthcare Supply Chain and Procurement Industry

Healthcare supply chain management has become a strategic priority for hospitals and healthcare organizations due to its direct impact on cost, efficiency, and patient outcomes.

Supply chain expenses represent approximately 14% of total hospital operating costs, making it one of the largest controllable expense categories for healthcare providers.

U.S. hospitals collectively spend over \$60 billion annually on medical and surgical supplies, including implants and medical devices, with costs continuing to rise due to inflation, demand, and supply chain disruptions.¹⁴

At the same time, the healthcare supply chain management technology market is expanding rapidly, with strong adoption of AI, cloud computing, and data analytics solutions. The global market is expected to reach approximately \$5 billion by 2030, driven by the need for efficiency, transparency, and cost optimization.

In the United States alone, the healthcare supply chain management market is projected to grow at a compound annual growth rate of approximately 14.9%, reflecting accelerating demand for digital transformation solutions.

Industry Challenges and Market Gaps

Despite the size and growth of the industry, significant inefficiencies remain, particularly in the procurement and management of medical devices.

Key challenges include:

- **Lack of pricing transparency:** Wide variations in device pricing across providers and regions
- **Fragmented procurement systems:** Reliance on manual processes and disconnected platforms
- **Regulatory complexity:** Increasing compliance requirements related to device traceability and supplier validation
- **Limited data standardization:** Inconsistent product classification and duplication of records
- **Supply chain disruptions:** Ongoing global challenges affecting availability and cost stability
- **Administrative burden:** High operational complexity in procurement, billing, and audit processes

These challenges create a substantial opportunity for integrated digital platforms that can centralize data, automate workflows, and improve governance across the supply chain.

¹⁴ <https://www.definitivehc.com/resources/healthcare-insights/changes-in-supply-costs-year-to-year>

Industry Trends and Future Outlook

Several key trends are shaping the future of the healthcare and medical device ecosystem:

- **Digital transformation of healthcare operations:** Increasing adoption of SaaS platforms, AI, and cloud-based systems
- **Shift toward data-driven decision-making:** Greater reliance on analytics for cost control and operational optimization
- **Expansion of value-based care models:** Increased pressure on providers to reduce costs while maintaining quality
- **Regulatory strengthening:** Growing emphasis on compliance, traceability, and auditability of medical devices
- **Integration and interoperability:** Demand for systems that connect procurement, clinical, and financial data
- **Focus on cost containment:** Rising urgency to address inefficiencies in high-cost areas such as medical device procurement

These trends indicate a strong and sustained demand for solutions like IntellexIA Health Technologies, which directly address structural inefficiencies in one of the most cost-sensitive areas of the healthcare system.

4.1 Industry Analysis

The U.S. healthcare industry operates as a highly complex, multi-layered ecosystem composed of providers, payers, manufacturers, and intermediaries, all interacting within a heavily regulated and cost-sensitive environment. Within this structure, the procurement and management of Implants and Medical Devices (IMD) represent a critical operational domain characterized by high financial impact, fragmented decision-making, and limited standardization.

Industry Structure and Stakeholder Dynamics

The healthcare procurement landscape is influenced by multiple stakeholders with distinct and often misaligned incentives. Hospitals and surgical centers are responsible for acquiring medical devices while maintaining clinical quality and financial sustainability. Physicians and surgical teams frequently influence device selection based on clinical preference and experience, which can introduce variability in purchasing decisions.

Health insurers and managed care organizations, on the other hand, focus on cost control, reimbursement accuracy, and fraud prevention, often operating with limited visibility into procurement processes at the provider level.

Additionally, manufacturers and distributors of medical devices operate within a competitive but opaque pricing environment, where negotiated contracts, volume-based discounts, and confidential pricing agreements contribute to significant price variability across institutions.

Group Purchasing Organizations (GPOs) further add complexity by negotiating contracts on behalf of multiple providers, yet these agreements do not always ensure optimal pricing transparency or standardization at the individual hospital level.

This fragmented structure creates inefficiencies, reduces negotiating power, and limits the ability of healthcare organizations to implement consistent procurement strategies.

Procurement Complexity and Operational Fragmentation

Medical device procurement processes are inherently complex and often involve multiple disconnected systems and manual workflows. In many healthcare organizations, procurement decisions rely on a combination of legacy systems, spreadsheets, and departmental processes that lack integration and standardization.

Key operational challenges include:

- Disparate data sources with inconsistent naming conventions for devices
- Limited integration between procurement, clinical, and billing systems
- Manual validation of supplier credentials and compliance documentation
- Lack of centralized visibility into inventory, pricing, and utilization
- Inefficient coordination between departments involved in surgical workflows

This fragmentation leads to operational inefficiencies, delays in procurement cycles, and increased administrative burden.

Pricing Variability and Lack of Transparency

One of the most significant structural issues within the industry is the lack of transparency in medical device pricing. Prices for identical or comparable devices can vary substantially across hospitals and regions due to factors such as contract terms, purchasing volume, supplier relationships, and negotiation capabilities.

The absence of standardized pricing benchmarks limits the ability of healthcare organizations to assess whether they are obtaining competitive pricing. As a result, hospitals often operate with incomplete information, reducing their capacity to control costs effectively.

This issue is particularly relevant in high-cost surgical procedures, where device costs can represent a substantial portion of total procedure expenses.

Regulatory Environment and Compliance Burden

The procurement and use of medical devices are subject to strict regulatory oversight, requiring healthcare organizations to maintain compliance with federal standards related to safety, traceability, and documentation.

Compliance obligations include:

- Verification of device approvals and regulatory status
- Maintenance of traceability records for implants and critical devices
- Documentation of supplier qualifications and certifications
- Audit readiness for regulatory inspections and payer reviews

However, many healthcare providers lack integrated systems to manage these requirements effectively, relying instead on manual processes that increase the risk of errors, non-compliance, and audit exposure.

Financial Pressures and Cost Containment Requirements

Healthcare organizations in the United States are under increasing financial pressure due to rising operational costs, reimbursement constraints, and the transition toward value-based care models. Within this context, supply chain and procurement functions have become a primary focus for cost containment efforts.

Medical devices, particularly implants used in surgical procedures, represent a high-cost category with significant variability and limited control mechanisms in place. As a result, improving procurement efficiency and cost transparency has become a strategic priority for healthcare providers and payers alike.

Technology Adoption and Digital Transformation Gap

While the healthcare industry has made progress in adopting electronic health records (EHRs) and clinical systems, the digital transformation of procurement and supply chain functions remains uneven. Many organizations still lack advanced tools for:

- Data standardization and centralization
- Real-time pricing analytics
- Automated compliance monitoring
- Integrated procurement workflow management

This gap presents a significant opportunity for specialized technology solutions that address procurement-specific challenges rather than general healthcare IT needs.

Industry Evolution and Strategic Shift

The industry is undergoing a gradual shift toward greater accountability, data-driven decision-making, and operational transparency. Healthcare organizations are increasingly recognizing the importance of integrating procurement, clinical, and financial data to improve efficiency and reduce costs.

There is also growing demand for:

- Standardized data frameworks across healthcare systems
- Integrated platforms that support end-to-end procurement processes
- Tools that enhance visibility into supplier performance and pricing
- Solutions that reduce administrative burden and improve audit readiness

These structural changes indicate a transition toward more coordinated and technology-enabled procurement strategies, creating favorable conditions for the adoption of platforms like IntellexIA Health Technologies.

4.2 Major Market Segmentation

The target market for IntellexIA Health Technologies is composed of institutional healthcare stakeholders involved in the procurement, management, and financial oversight of implants and medical devices (IMD). These segments are defined based on their operational role within the healthcare system, their level of exposure to procurement inefficiencies, and their capacity to benefit from data-driven, integrated technology solutions.

The company's platform is designed to address the needs of organizations that require enhanced transparency, regulatory compliance, and cost control across the medical device supply chain.

Hospitals and Health Systems

Hospitals and multi-facility health systems represent the primary target market for IntellexIA Health Technologies. These organizations are responsible for large-scale procurement of medical devices and face significant challenges related to pricing variability, supplier management, and operational inefficiencies.¹⁵

Large hospital systems often operate across multiple locations, each with its own procurement practices, supplier contracts, and data structures. This decentralization creates inconsistencies in purchasing decisions, limits visibility into total spending, and reduces the ability to negotiate effectively with suppliers.

¹⁵<https://www.mckinsey.com/industries/healthcare/our-insights/optimizing-health-system-supply-chain-performance>

The platform enables these organizations to:

- Standardize IMD data across facilities
- Centralize procurement workflows
- Improve visibility into pricing and supplier performance
- Strengthen regulatory compliance and audit readiness
- Optimize cost management at a system-wide level

This segment offers strong revenue potential due to high transaction volumes, recurring procurement needs, and long-term contractual relationships.

Outpatient Surgical Centers and Specialty Clinics

Ambulatory Surgical Centers (ASCs) and specialty clinics, particularly those focused on orthopedics, cardiology, and other device-intensive specialties, represent a rapidly growing segment of the healthcare market.¹⁶

These organizations often operate with lean administrative structures and limited procurement infrastructure, making them more vulnerable to pricing inefficiencies and compliance risks. At the same time, they are under increasing pressure to deliver cost-effective care while maintaining high clinical standards.

IntellexIA Health Technologies provides these organizations with:

- Simplified procurement and supplier management tools
- Access to pricing intelligence and benchmarking
- Structured data for device tracking and documentation
- Automation of administrative and compliance processes

The scalability and ease of implementation of the platform make it particularly suitable for this segment, which requires efficient solutions without heavy internal IT investment.

Health Insurance Companies and Payers

Health insurers and payer organizations represent a strategic segment with a strong interest in cost control, billing accuracy, and fraud prevention related to medical device utilization.

These organizations typically lack direct visibility into procurement processes at the provider level, which limits their ability to validate costs and ensure appropriate reimbursement.

Through data integration and analytics capabilities, IntellexIA Health Technologies enables payers to:

¹⁶<https://www.healthcarefinancenews.com/news/ambulatory-surgery-centers-expand-revenues-investments-surge>

- Access structured data on device utilization and pricing
- Improve validation of claims and reimbursement processes
- Identify cost anomalies and inefficiencies
- Enhance transparency across the care delivery ecosystem

This segment is particularly relevant for partnerships and data-driven collaborations that support value-based care models and cost containment strategies.

Healthcare Networks and Integrated Delivery Systems (IDS)

Integrated Delivery Networks (IDNs) and healthcare networks that combine hospitals, clinics, and physician groups represent a high-value segment due to their scale and need for coordinated operations.

These organizations require unified systems that can support standardized processes across multiple care settings while maintaining visibility and control over procurement and clinical operations.

IntellexIA Health Technologies supports this segment by:

- Providing cross-facility data integration and interoperability
- Enabling centralized governance of procurement and compliance
- Supporting system-wide cost optimization initiatives
- Facilitating coordination between clinical, financial, and operational teams

The platform's ability to operate as an integrated layer across complex healthcare environments makes it particularly valuable for large networks.

Medical Device Manufacturers and Distributors

Although not the primary buyers of the platform, medical device manufacturers and distributors represent an important secondary segment within the ecosystem.

These organizations benefit indirectly from improved data standardization, transparency, and structured procurement processes, which can enhance demand forecasting, contract management, and supplier relationships.

Potential engagement with this segment includes:

- Integration of product data into standardized catalogs
- Participation in transparent and structured procurement environments
- Improved alignment with healthcare provider requirements

This segment also represents opportunities for strategic partnerships and data integration.

Group Purchasing Organizations (GPOs)

Group Purchasing Organizations play a central role in negotiating contracts for healthcare providers, yet often face limitations related to data visibility and pricing standardization at the individual hospital level.

IntellexIA Health Technologies can complement GPO operations by:

- Providing enhanced data analytics and pricing intelligence
- Supporting contract performance monitoring
- Increasing transparency in procurement outcomes
- Enabling better alignment between negotiated contracts and actual purchasing behavior

This creates opportunities for collaboration and integration with existing procurement structures.

Market Segmentation Strategy

IntellexIA Health Technologies will initially prioritize small to mid-sized hospitals, outpatient surgical centers, and specialty clinics, as these segments present a combination of high need, faster adoption cycles, and lower barriers to entry.

As the company scales its platform and expands its operational capacity, it will progressively target larger hospital systems, integrated delivery networks, and payer organizations, enabling broader impact and increased revenue potential.

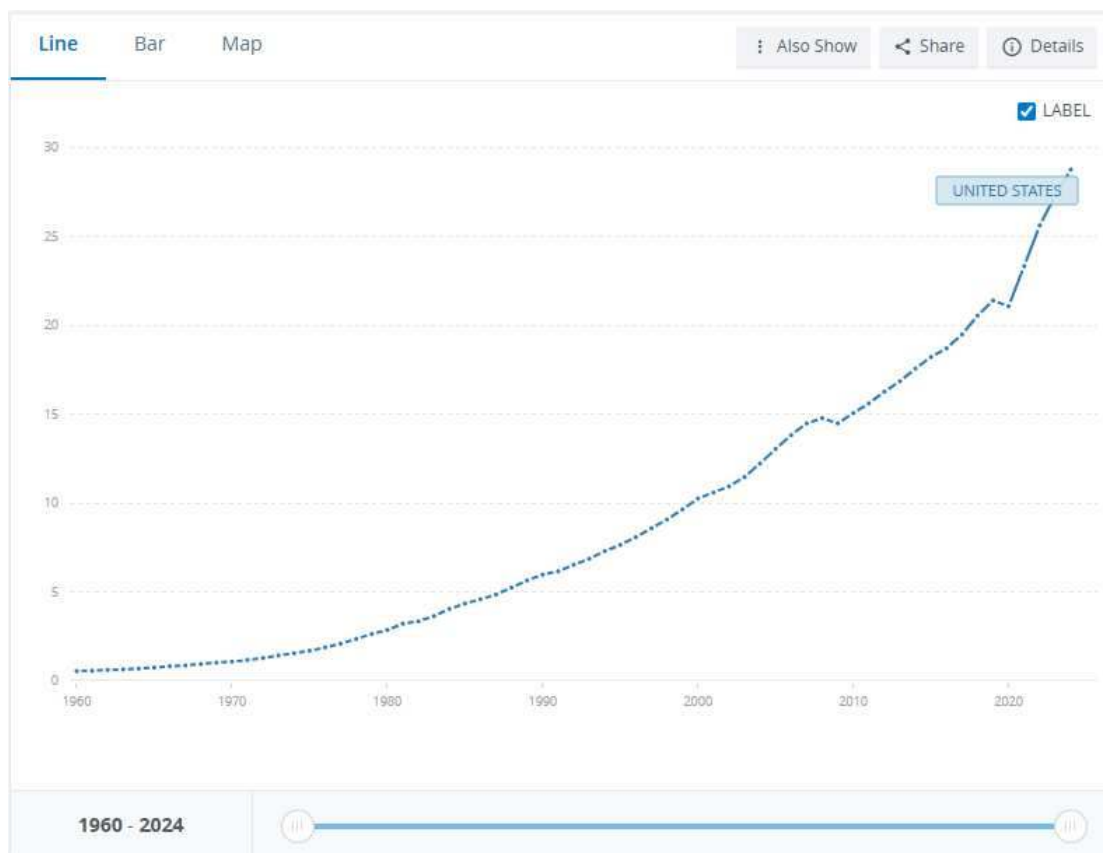
4.3 Business Location

IntellexIA Health Technologies will be headquartered in Naples, Florida, a region recognized for its strong healthcare infrastructure, high concentration of medical service providers, and growing demand for advanced healthcare management and technology solutions. The selection of Naples as the company's base of operations aligns strategically with its focus on optimizing healthcare procurement, improving operational efficiency, and supporting data-driven decision-making within the U.S. healthcare system.

Regional Economic Strength

Naples is located within Collier County, one of the most economically stable and affluent regions in Florida. The county has a Gross Domestic Product (GDP) exceeding \$25 billion, supported by key sectors such as healthcare, professional services, and real estate.¹⁷

¹⁷ <https://data.worldbank.org/indicator/NY.GDP.MKTP.CD?locations=US>



The region benefits from:

- A median household income above \$75,000, higher than the national average
- A strong base of high-income residents and private healthcare demand
- Continued population growth, particularly among retirees and aging populations

These economic characteristics contribute to increased healthcare utilization and demand for efficient medical services, particularly those involving high-cost procedures and medical devices.

Healthcare Market and Demand Drivers

Naples and the broader Southwest Florida region have a well-developed healthcare ecosystem, driven largely by demographic trends. The area has one of the highest proportions of elderly residents in the United States, creating sustained demand for surgical procedures, chronic care management, and medical devices.

Key regional indicators include:

- More than 30% of the population aged 65 and older, significantly above the national average¹⁸

¹⁸ https://acl.gov/sites/default/files/Profile%20of%20OA/ACL_ProfileOlderAmericans2023_508.pdf

- A high volume of procedures in specialties such as orthopedics, cardiology, and vascular care
- Presence of major healthcare providers, including regional hospital systems, specialty clinics, and outpatient surgical centers

These factors make Naples an ideal environment for solutions focused on medical device procurement, utilization tracking, and cost optimization.

Healthcare Infrastructure and Institutional Presence

The Naples region is supported by a network of established healthcare institutions, including hospitals, ambulatory surgical centers (ASCs), and specialty clinics. These organizations operate within increasingly complex regulatory and financial environments, requiring improved systems for procurement, compliance, and operational coordination.

Healthcare providers in the region face challenges such as:

- Rising costs of implants and medical devices
- Increasing regulatory and documentation requirements
- Fragmented procurement and data management systems
- Pressure to improve efficiency while maintaining quality of care

IntellexIA Health Technologies is strategically positioned to address these challenges by offering a platform that integrates procurement, compliance, and data intelligence into a unified system.

Access to Talent and Operational Efficiency

While Naples is not traditionally a large technology hub, it offers access to a skilled workforce in healthcare administration, operations, and business management. Additionally, the company's cloud-based and scalable technology model allows for:

- Remote hiring of specialized technical talent (software engineers, AI developers, data scientists)
- Flexible workforce expansion beyond geographic constraints
- Reduced dependency on local infrastructure for platform development

This hybrid operational model enables IntellexIA Health Technologies to maintain cost efficiency while accessing top-tier talent across the United States.

Strategic Geographic Positioning

Naples provides strategic proximity to major healthcare markets in Florida, including Miami, Fort Lauderdale, Tampa, and Orlando. This positioning allows the company to:

- Expand its services across high-demand healthcare regions
- Establish partnerships with hospital systems and healthcare networks statewide

- Leverage Florida’s status as one of the largest healthcare markets in the country

Florida’s large and growing population, combined with its high healthcare utilization rates, creates a strong foundation for the company’s expansion strategy.

Conclusion

The selection of Naples, Florida as the headquarters of IntellexIA Health Technologies offers a strategic combination of:

- Strong healthcare demand driven by demographic trends
- Established healthcare infrastructure and provider networks
- Economic stability and high-income population base
- Geographic access to major healthcare markets across Florida

These factors position the company to effectively introduce and scale its healthcare technology solutions while addressing critical inefficiencies in medical device procurement and management at both regional and national levels.

5.0 Strategy and Implementation

The Strategy and Implementation section is essential to understanding how IntellexIA Health Technologies will position itself within the healthcare technology industry, attract institutional clients, and achieve sustainable growth through its AI-driven platform focused on medical device procurement, compliance, and data standardization.

Here are the key components of this section:

1. **SWOT Analysis:** This analysis evaluates the company’s strengths, weaknesses, opportunities, and threats. It helps identify competitive advantages, such as its specialized focus on IMD procurement and SaaS-based platform, while also addressing potential challenges, including market entry and industry competition.
2. **Website:** The company’s website will serve as a primary digital interface, presenting its platform capabilities, value proposition, and service offerings. It will be designed to communicate efficiency gains, cost optimization, and compliance benefits to healthcare organizations.
3. **Digital Marketing:** The company will implement targeted digital marketing strategies, including SEO, email marketing, content marketing, and PPC campaigns, aimed at reaching healthcare decision-makers and generating qualified leads.
4. **Social Media:** Platforms such as LinkedIn will be used to engage with healthcare professionals, share industry insights, and strengthen brand positioning within the HealthTech sector, aligned with the company’s overall marketing strategy.

5. **Trade Shows:** Participation in healthcare and technology events will provide opportunities for networking, brand exposure, and direct engagement with potential clients and partners.
6. **Referrals:** The company will leverage client relationships and strategic partnerships to generate referrals, supporting credibility and growth in a relationship-driven industry.

In Sections 5.3 and 5.4, the company will detail its sales strategy and forecast. The sales strategy will outline how IntellexIA Health Technologies will approach client acquisition, contract development, and retention. The sales forecast will present projected revenue growth based on market demand, pricing structure, and the scalability of its SaaS platform.

5.1 Swot Analysis

A SWOT analysis is a strategic planning tool that helps businesses identify their internal strengths and weaknesses, as well as external opportunities and threats. By analyzing these factors, IntellexIA Health Technologies can develop effective strategies to leverage its strengths and opportunities while mitigating risks and addressing weaknesses.

5.1.1 Strengths

- Specialized focus on IMD procurement, pricing intelligence, and regulatory compliance
- Scalable SaaS platform with cloud-based architecture and modular capabilities
- Integration of data standardization, procurement workflows, and audit management in a single solution
- Strong value proposition focused on cost reduction and operational efficiency
- High demand for transparency and governance in medical device supply chains
- Founder's expertise in healthcare technology, system integration, and regulated environments
- Ability to integrate with existing hospital systems (ERP, EHR, supply chain platforms)
- Recurring revenue model through subscription-based services

5.1.2 Weaknesses

- Early-stage company with limited brand recognition in the U.S. healthcare market
- Dependence on client adoption cycles, which tend to be longer in healthcare

5.1.3 Opportunities

- Increasing pressure on healthcare providers to reduce costs and improve efficiency
- Growing demand for pricing transparency in medical devices and surgical procedures
- Expansion of value-based care models requiring better cost control and data integration
- Rising adoption of digital health and SaaS solutions across healthcare systems
- Regulatory focus on compliance, traceability, and auditability of medical devices
- Market gap in integrated platforms for IMD procurement and governance
- Potential partnerships with healthcare networks, payers, and system integrators
- Expansion opportunities across multiple U.S. regions and healthcare segments

5.1.4 Threats

- Regulatory complexity and changes in healthcare compliance requirements
- Competition from established healthcare IT providers and procurement systems

5.2 Website and Digital Marketing

The website and digital marketing strategy for IntellexIA Health Technologies will play a critical role in establishing the company's presence within the healthcare technology sector. As a specialized platform focused on IMD procurement, compliance, and data standardization, the company's digital positioning will emphasize credibility, technical capability, and measurable value for healthcare organizations.

Website Strategy:

1. **Professional and User-Friendly Design:** The website will feature a modern and intuitive design that reflects the company's focus on innovation, efficiency, and reliability. It will include clearly structured sections for services, platform capabilities, industry applications, and contact information.
2. **Service Pages:** Each core service will have a dedicated page explaining its functionality, operational benefits, and impact on cost reduction, compliance, and procurement efficiency within healthcare organizations.
3. **Insights and Resources Section:** The website will include regularly updated content focused on healthcare procurement optimization, medical device governance, and industry trends. This supports thought leadership positioning and improves search visibility.
4. **Lead Generation and Contact Forms:** Strategically placed contact forms and calls-to-action will support client acquisition, encouraging visitors to request demonstrations, consultations, or additional information.
5. **SEO Optimization:** The website will be optimized using targeted keywords related to healthcare supply chain, medical device management, and HealthTech solutions to increase organic visibility among institutional buyers.
6. **Responsive Design:** The platform will be fully responsive, ensuring accessibility and usability across desktops, tablets, and mobile devices.

Digital Marketing Strategy:

1. **Search Engine Marketing (SEM):** Targeted PPC campaigns will be used to attract high-intent users searching for healthcare procurement and compliance solutions.
2. **Social Media Marketing:** Professional platforms, particularly LinkedIn, will be used to engage healthcare executives, share insights, and strengthen industry presence.

3. **Content Marketing:** The company will produce white papers, case studies, and analytical content demonstrating expertise in IMD procurement, pricing intelligence, and regulatory compliance.
4. **Email Marketing:** Segmented email campaigns will be used to nurture leads, share updates, and maintain engagement with healthcare stakeholders.
5. **Webinars and Online Events:** The company will host webinars focused on healthcare cost optimization, procurement efficiency, and compliance strategies, supporting lead generation and authority building.
6. **Analytics and Performance Tracking:** Digital performance will be monitored using analytics tools to evaluate traffic, engagement, and conversion rates, allowing continuous optimization of marketing efforts.

By implementing this strategy, IntellexIA Health Technologies will establish a strong digital presence, attract qualified institutional clients, and position itself as a trusted provider of healthcare technology solutions.

5.3 Sales Strategy

A structured sales strategy will be implemented to support the growth of IntellexIA Health Technologies within the healthcare sector. The approach will focus on acquiring institutional clients, demonstrating measurable value, and building long-term relationships.

Key elements include:

1. **Understanding the Customer:** The company will focus on healthcare organizations such as hospitals, surgical centers, and healthcare networks, identifying their needs related to cost control, compliance, and procurement efficiency.
2. **Unique Selling Proposition:** The company's value proposition is based on providing an integrated platform that combines data standardization, pricing intelligence, and regulatory compliance, improving transparency and reducing costs in medical device procurement.
3. **Relationship Building:** The sales approach will prioritize long-term relationships with clients through consultative engagement, onboarding support, and continuous value delivery.
4. **Leverage Referrals:** Client satisfaction will be leveraged to generate referrals, supporting growth in a relationship-driven healthcare environment.
5. **Digital Engagement:** Digital channels, including the website and targeted content, will support lead generation and client engagement throughout the sales process.
6. **Sales Training:** The sales team will be trained to understand both the technical aspects of the platform and the operational challenges faced by healthcare organizations.

7. **Performance Metrics:** The company will track key performance indicators such as conversion rates, client acquisition cost, and customer retention to continuously refine its sales strategy.

In conclusion, this sales strategy supports sustainable growth by combining targeted client acquisition, strong value delivery, and long-term relationship development within a complex and highly regulated industry.

5.4 Sales Forecast

The sales forecast for IntellexIA Health Technologies is based on a structured and scalable revenue model that combines recurring SaaS subscriptions with implementation and consulting services. The projections reflect a conservative market entry in Year 1, followed by steady growth driven by client acquisition, platform adoption, and expansion within the healthcare sector.

Revenue Structure

The company's revenue model is composed of four primary service lines:

- **SaaS – Small & Mid Clients:** Annual subscription model targeting outpatient clinics and smaller healthcare organizations
- **SaaS – Enterprise Clients:** Higher-value subscriptions for hospital systems and large healthcare networks
- **Implementation & Integration:** One-time services associated with onboarding, system configuration, and integration
- **Consulting & Customization:** Additional services for workflow optimization, advanced configurations, and ongoing support

This structure ensures a balance between recurring revenue (SaaS) and project-based revenue (implementation and consulting).

Year 1 – Market Entry

In Year 1, the company is projected to generate \$515,000 in total revenue, based on:

- 5 SaaS small and mid-sized clients
- 1 enterprise SaaS client
- 5 implementation projects
- 4 consulting engagements

The initial focus is on early adopters, allowing the company to validate the platform, establish credibility, and build case studies within the healthcare market.

Growth Strategy (Years 2–5)

Revenue growth is driven by:

- Expansion of the client base across healthcare providers
- Gradual increase in enterprise-level contracts
- Recurring subscription renewals and upselling opportunities
- Continued demand for implementation and customization services

By Year 5, the company is projected to reach:

- 69 total annual service engagements
- 24 SaaS small/mid clients and 6 enterprise clients
- Total revenue of \$3,103,187

This reflects a realistic adoption curve aligned with healthcare industry sales cycles.

Pricing Strategy

Pricing is structured on an annual basis and increases moderately over time to reflect platform evolution and added value:

- Small & Mid SaaS: starting at \$42,000/year
- Enterprise SaaS: starting at \$120,000/year
- Implementation: starting at \$25,000 per project
- Consulting: starting at \$15,000 per engagement

Incremental price adjustments are applied annually to account for enhanced capabilities and market positioning.

Cost Structure and Margins

Direct costs of sales include:

- Cloud infrastructure and hosting
- Technical support and platform maintenance
- Service delivery resources

Due to the scalable nature of the SaaS model, direct costs remain proportionally low, resulting in strong and consistent gross margins across all years.

Overall Financial Outlook

- Revenue grows from \$515,000 (Year 1) to \$3,103,187 (Year 5)
- Growth is driven by recurring SaaS revenue and client expansion

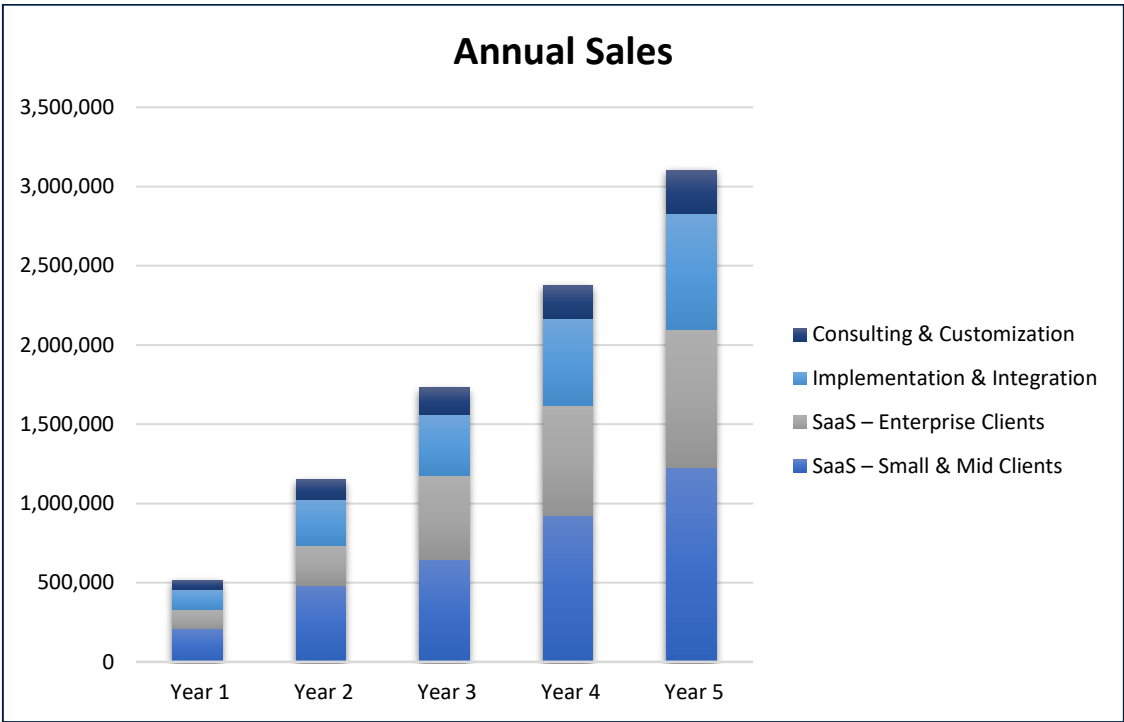
- The model supports scalability, operational efficiency, and long-term profitability

Overall, the sales forecast demonstrates a balanced, realistic, and scalable growth trajectory, aligned with market demand for healthcare technology solutions focused on cost optimization, regulatory compliance, and data-driven procurement management.

5.4.1 Annual Sales Forecast Table

<i>Sales Forecast</i>					
	Year 1	Year 2	Year 3	Year 4	Year 5
Unit Sales					
SaaS – Small & Mid Clients	5	11	14	19	24
SaaS – Enterprise Clients	1	2	4	5	6
Implementation & Integration	5	11	14	19	24
Consulting & Customization	4	8	10	12	15
Total Unit Sales	15	32	42	55	69
Unit Prices	Year 1	Year 2	Year 3	Year 4	Year 5
SaaS – Small & Mid Clients	\$42,000.00	\$44,100.00	\$46,305.00	\$48,620.25	\$51,051.26
SaaS – Enterprise Clients	\$120,000.00	\$126,000.00	\$132,300.00	\$138,915.00	\$145,860.75
Implementation & Integration	\$25,000.00	\$26,250.00	\$27,562.50	\$28,940.63	\$30,387.66
Consulting & Customization	\$15,000.00	\$15,750.00	\$16,537.50	\$17,364.38	\$18,232.59
Sales					
SaaS – Small & Mid Clients	\$210,000	\$485,100	\$648,270	\$923,785	\$1,225,230
SaaS – Enterprise Clients	\$120,000	\$252,000	\$529,200	\$694,575	\$875,165
Implementation & Integration	\$125,000	\$288,750	\$385,875	\$549,872	\$729,304
Consulting & Customization	\$60,000	\$126,000	\$165,375	\$208,373	\$273,489
Total Sales	\$515,000	\$1,151,850	\$1,728,720	\$2,376,604	\$3,103,187
Direct Unit Costs	Year 1	Year 2	Year 3	Year 4	Year 5
SaaS – Small & Mid Clients	\$3,360.00	\$3,528.00	\$3,704.40	\$3,889.62	\$4,084.10
SaaS – Enterprise Clients	\$9,600.00	\$10,080.00	\$10,584.00	\$11,113.20	\$11,668.86
Implementation & Integration	\$2,000.00	\$2,100.00	\$2,205.00	\$2,315.25	\$2,431.01
Consulting & Customization	\$1,200.00	\$1,260.00	\$1,323.00	\$1,389.15	\$1,458.61
Direct Cost of Sales					
SaaS – Small & Mid Clients	\$16,800	\$38,808	\$51,862	\$73,903	\$98,018
SaaS – Enterprise Clients	\$9,600	\$20,160	\$42,336	\$55,566	\$70,013
Implementation & Integration	\$10,000	\$23,100	\$30,870	\$43,990	\$58,344
Consulting & Customization	\$4,800	\$10,080	\$13,230	\$16,670	\$21,879
Subtotal Direct Cost of Sales	\$41,200	\$92,148	\$138,298	\$190,128	\$248,255

5.4.2 Annual Sales Chart



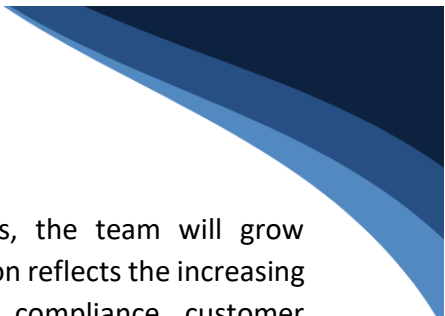
6.0 Management Structure

As previously mentioned, Mr. Antonio de Azevedo Donatti will be the General Manager and Head of Product and Technology of IntellexIA Health Technologies. The Personnel Plan shows that the company expects to make gradual investments in personnel in the first years of operation, and by year 5, the company will have 18 employees, including Mr. Antonio de Azevedo Donatti.

6.1 Staffing Requirements

IntellexIA Health Technologies has developed a structured personnel plan to support its growth as a specialized provider of healthcare technology solutions focused on AI, data infrastructure, and medical device procurement optimization. The plan outlines the company’s hiring strategy, workforce expansion, and projected payroll over a five-year period, ensuring alignment between operational needs and revenue growth.

In Year 1, the company will begin operations with a core team of **4 professionals**, including Mr. Antonio de Azevedo Donatti as General Manager and Head of Product and Technology, with an annual salary of \$110,000. The initial team also includes a Data Analyst / Data Engineer, a Sales / Business Development Manager, and an Administrative / Operations Support professional. This lean structure supports early-stage operations while maintaining efficiency during market entry.



As the company expands its client base and platform capabilities, the team will grow progressively, reaching a total of **18 employees by Year 5**. This expansion reflects the increasing demand for technical development, data management, regulatory compliance, customer support, and business development activities.

Key roles and their evolution include:

- **Software Engineers:** Introduced in Year 2 with one professional and expanding to two by Year 4, supporting platform development, system scalability, and integration capabilities.
- **Data Analyst / Data Engineer:** Starting with one professional in Year 1 and expanding to three by Year 4, supporting data processing, analytics, and interoperability functions.
- **Regulatory & Compliance Specialists:** Introduced in Year 2 and expanding to two professionals from Year 3 onward, ensuring adherence to healthcare regulations and audit requirements.
- **Product Managers:** Added in Year 2 and expanding to two professionals by Year 5, responsible for product development, feature prioritization, and platform evolution.
- **Customer Success / Support Specialists:** Introduced in Year 2 and expanding to three professionals by Year 5, ensuring client onboarding, support, and retention.
- **Sales / Business Development Managers:** Starting with one professional in Year 1 and expanding to four by Year 5, supporting client acquisition, partnerships, and market expansion.
- **Administrative / Operations Support:** Maintained as a stable function with one professional throughout the five-year period, ensuring operational continuity and internal coordination.

The company's payroll is projected to grow from **\$296,000 in Year 1 to \$2,012,700 in Year 5**, reflecting the planned expansion of personnel and gradual salary adjustments. This growth is directly aligned with revenue expansion and increased operational complexity.

This phased hiring strategy allows IntellexIA Health Technologies to scale efficiently, aligning workforce growth with market demand, platform development needs, and client acquisition. By maintaining a balance between technical, operational, and commercial roles, the company ensures its ability to deliver high-quality services while sustaining long-term growth within the U.S. healthcare technology sector.

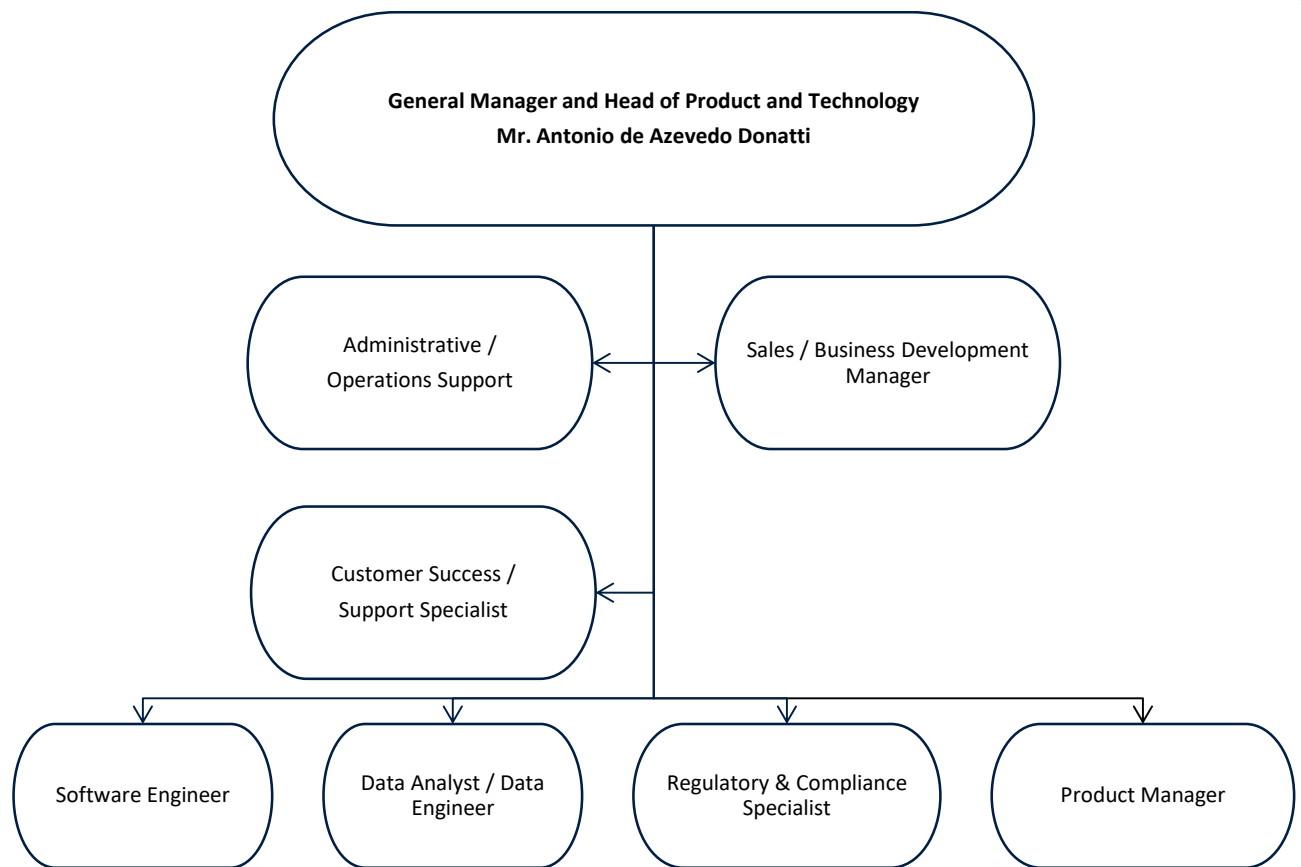
6.2 Annual Personnel Plan Table

<i>Personnel Plan</i>					
	Year 1	Year 2	Year 3	Year 4	Year 5
General Manager and Head of Product and Technology - Mr. Antonio de Azevedo Donatti	\$110,000	\$155,250	\$178,538	\$205,318	\$236,116
Software Engineer	\$0	\$123,480	\$129,654	\$272,273	\$285,887
Data Analyst / Data Engineer	\$75,000	\$94,500	\$198,450	\$312,559	\$328,187
Regulatory & Compliance Specialist	\$0	\$99,750	\$209,475	\$219,949	\$230,946
Product Manager	\$0	\$110,250	\$115,763	\$121,551	\$255,256
Customer Success / Support Specialist	\$0	\$63,000	\$132,300	\$138,915	\$218,791
Sales / Business Development Manager	\$81,600	\$85,680	\$179,928	\$283,387	\$396,741
Administrative / Operations Support	\$29,400	\$52,500	\$55,125	\$57,881	\$60,775
Total People	4	8	12	15	18
Total Payroll	\$296,000	\$784,410	\$1,199,232	\$1,611,833	\$2,012,700

6.3 Five-Year Personnel Plan Table

<i>Personnel Plan</i>					
	Year 1	Year 2	Year 3	Year 4	Year 5
General Manager and Head of Product and Technology - Mr. Antonio de Azevedo Donatti	1	1	1	1	1
Software Engineer	0	1	1	2	2
Data Analyst / Data Engineer	1	1	2	3	3
Regulatory & Compliance Specialist	0	1	2	2	2
Product Manager	0	1	1	1	2
Customer Success / Support Specialist	0	1	2	2	3
Sales / Business Development Manager	1	1	2	3	4
Administrative / Operations Support	1	1	1	1	1
Total People	4	8	12	15	18

6.4 Organizational Chart – Year 5



6.5 Duties and Responsibilities

General Manager and Head of Product and Technology – Mr. Antonio de Azevedo Donatti

- Define the company's strategic direction, product vision, and long-term growth objectives
- Oversee the development and evolution of the SaaS platform, ensuring alignment with market needs and regulatory requirements
- Lead product strategy, including feature prioritization, roadmap planning, and innovation initiatives
- Supervise technical teams and ensure effective execution of development, integration, and data infrastructure activities
- Establish partnerships with healthcare organizations, technology providers, and strategic stakeholders
- Oversee financial performance, budgeting, and resource allocation to support sustainable growth
- Ensure compliance with healthcare regulations, data governance standards, and operational policies

- Represent the company in business development activities, negotiations, and high-level client engagements

Software Engineer

- Develop and maintain the company's cloud-based SaaS platform and system architecture
- Implement integrations with healthcare systems, APIs, and data infrastructure components
- Ensure system performance, scalability, and security across platform environments
- Collaborate with product and data teams to deliver new features and improvements

Data Analyst / Data Engineer

- Design and manage data pipelines, ensuring accurate and reliable data processing
- Develop analytical models and dashboards to support pricing intelligence and operational insights
- Standardize and structure healthcare data for interoperability and reporting
- Support data-driven decision-making across product and operational teams

Regulatory & Compliance Specialist

- Monitor and ensure compliance with healthcare regulations and industry standards
- Develop and maintain internal compliance policies and audit frameworks
- Support regulatory documentation, reporting, and audit readiness processes
- Identify and mitigate compliance risks within platform operations and client implementations

Product Manager

- Define product requirements and translate business needs into technical specifications
- Manage the product roadmap and coordinate feature development with technical teams
- Monitor product performance and user feedback to drive continuous improvements
- Ensure alignment between product functionality and client needs

Customer Success / Support Specialist

- Support client onboarding and ensure smooth platform implementation
- Provide ongoing assistance and resolve technical or operational issues
- Maintain strong relationships with clients to support retention and satisfaction
- Monitor client usage and identify opportunities for optimization and expansion

Sales / Business Development Manager

- Identify and develop new business opportunities within the healthcare sector
- Manage the sales pipeline, including prospecting, presentations, and contract negotiations
- Build relationships with healthcare organizations and strategic partners
- Support revenue growth through client acquisition and account expansion

Administrative / Operations Support

- Manage day-to-day administrative and operational activities

- Support financial tracking, documentation, and internal coordination
- Assist with HR-related tasks, scheduling, and organizational processes
- Ensure efficient internal communication and operational workflow

7.0 Financial Summary

The financial plan for IntellexIA Health Technologies will be a critical analysis of the company's financial projections, including revenue, expenses, and overall financial performance. It will offer a comprehensive overview of the expected financial trajectory over a specific period of time and determine the company's financial feasibility. The plan will encompass essential aspects such as startup funding, profit and loss, cash flow, and balance sheet. The financial plan will play a crucial role in determining the company's success and will help in making informed decisions to ensure that the company achieves its financial objectives.

7.1 Break-even Analysis

The Break-even Analysis is a crucial financial tool for IntellexIA Health Technologies, aimed at identifying the point where the company's total revenues exactly match its total expenses. For IntellexIA Health Technologies, this financial equilibrium is projected to be achieved when monthly sales reach 1 units, resulting in revenue of \$32,862. This analysis is underpinned by several key assumptions:

1. **Average Revenue Per Unit:** Each unit sold is expected to generate an average revenue of \$34,333.33.
2. **Average Variable Cost Per Unit:** The average variable cost per unit is estimated to be \$2,746.67.
3. **Monthly Fixed Costs:** The company is anticipated to incur consistent monthly fixed costs amounting to \$30,233, which will remain constant regardless of the sales volume.

Understanding the break-even point is essential for guiding IntellexIA Health Technologies' strategic direction. It serves as a vital indicator for setting realistic sales targets, managing budgets effectively, and steering the company toward financial stability and profitability.

7.1.1 Break-even Analysis Chart

Break-even Analysis	
Monthly Units Break-even	1
Monthly Revenue Break-even	\$32,862
Assumptions:	
Average Per-Unit Revenue	\$34,333.33
Average Per-Unit Variable Cost	\$2,746.67
Estimated Monthly Fixed Cost	\$30,233

7.2 Profit and Loss Assumptions

IntellexIA Health Technologies has developed a structured financial model designed to support the growth of a scalable healthcare technology company operating under a SaaS-based model. The company's financial strategy is centered on recurring revenue generation, controlled operational expansion, and efficient cost management.

The business model combines subscription-based SaaS services with implementation and consulting activities, allowing for both predictable recurring revenue and additional project-based income. As the company expands its client base, direct costs are expected to increase proportionally, primarily driven by cloud infrastructure, platform maintenance, and service delivery resources.

Revenue is projected to grow from \$515,000 in Year 1 to \$3,103,187 by Year 5, reflecting gradual client acquisition, increased adoption of enterprise solutions, and expansion of service offerings. This growth is aligned with the typical sales cycle of the healthcare industry, which requires longer decision-making processes but results in high-value, long-term contracts.

Direct cost of sales is expected to increase from \$41,200 in Year 1 to \$248,255 in Year 5, remaining relatively low in proportion to total revenue due to the scalability of the SaaS model. As a result, the company maintains a consistent gross margin of approximately 92% throughout the projection period, reflecting the high-value nature of its technology-driven services.

Operating expenses are primarily driven by payroll, which represents the company's largest investment as it builds a specialized team in software development, data engineering, compliance, and business development. Total operating expenses are projected to grow from \$362,800 in Year 1 to \$2,309,211 by Year 5, supporting the company's expansion and increased operational capacity.

Profitability is expected to improve steadily over time. Earnings before interest and taxes (EBIT) are projected to grow from \$111,000 in Year 1 to \$545,722 by Year 5, while EBITDA increases from \$111,000 to \$553,222 over the same period, demonstrating strong operational performance.

Net profit is projected to increase from \$81,030 in Year 1 to \$398,377 by Year 5, with net profit margins ranging from approximately 8.6% to 15.7% across the five-year period. This reflects a balanced approach between reinvestment in growth and operational efficiency.

The company does not rely on external financing, and no interest expenses are projected. Tax obligations are incorporated based on federal and state assumptions, increasing proportionally with profitability.

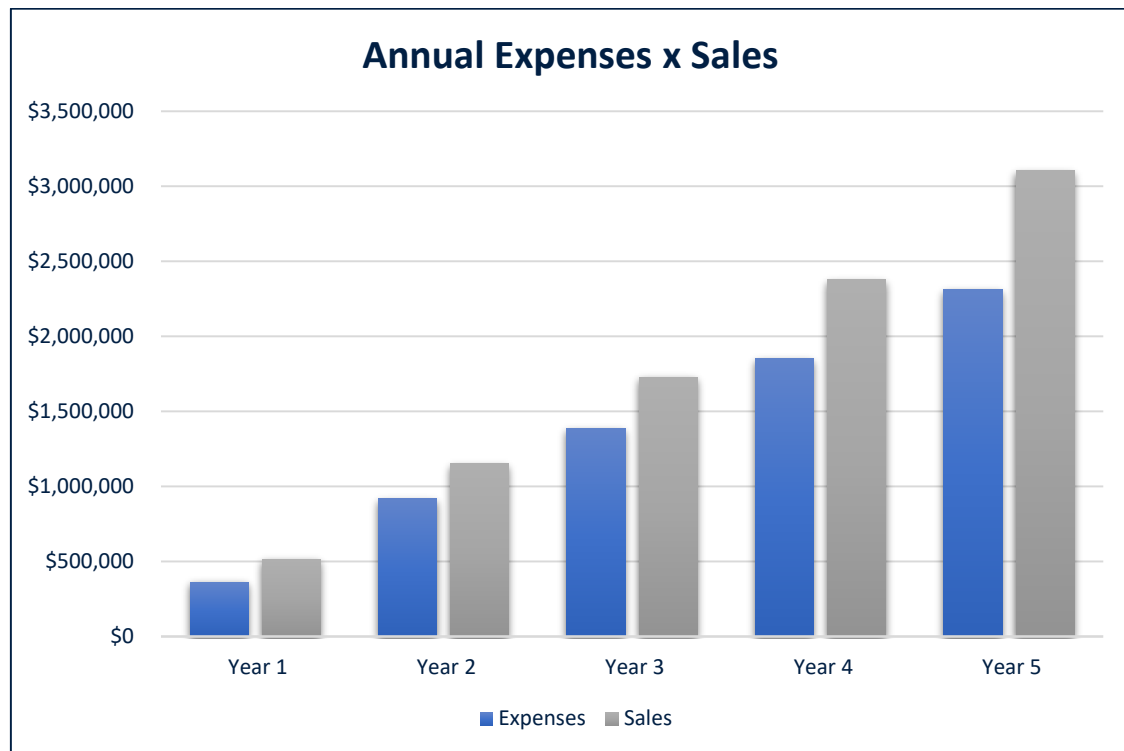
Overall, the financial projections demonstrate a scalable, high-margin, and sustainable business model, supported by recurring revenue, controlled cost structure, and increasing demand for

healthcare technology solutions focused on efficiency, compliance, and data-driven decision-making.

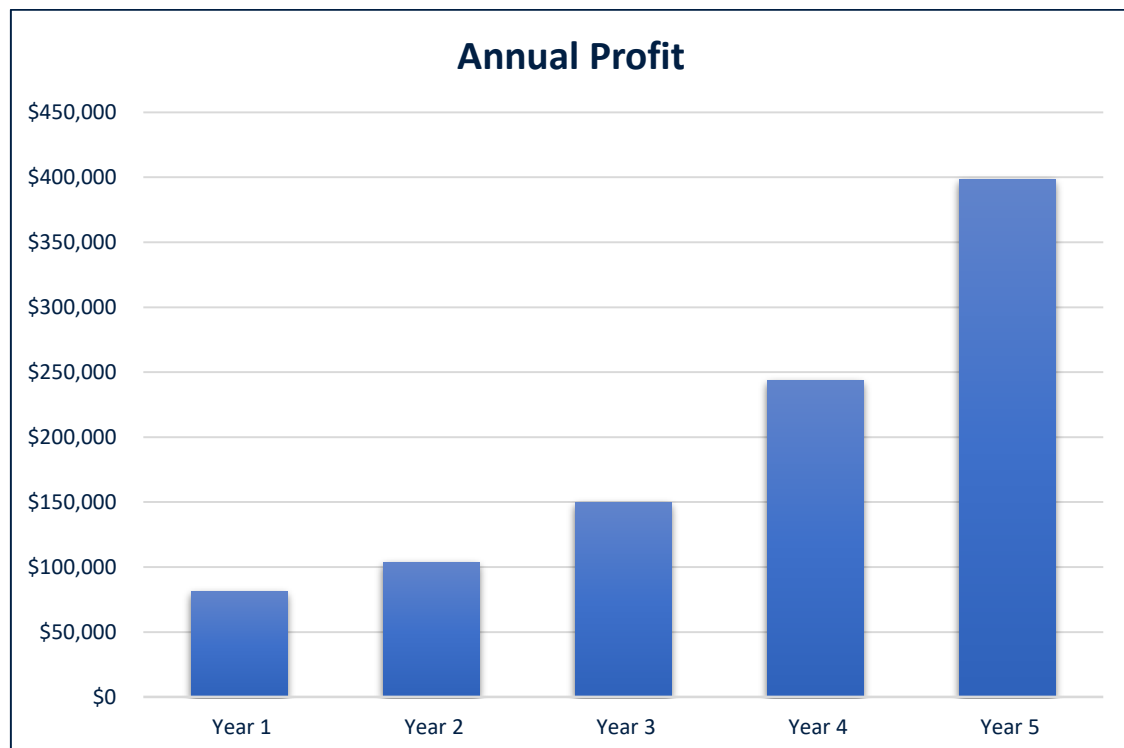
7.2.1 Annual Profit and Loss Table

<i>Pro Forma Profit and Loss</i>					
	Year 1	Year 2	Year 3	Year 4	Year 5
Sales	\$515,000	\$1,151,850	\$1,728,720	\$2,376,604	\$3,103,187
Direct Cost of Sales	\$41,200	\$92,148	\$138,298	\$190,128	\$248,255
Other Costs of Sales	\$0	\$0	\$0	\$0	\$0
Total Cost of Sales	\$41,200	\$92,148	\$138,298	\$190,128	\$248,255
Gross Margin	\$473,800	\$1,059,702	\$1,590,422	\$2,186,476	\$2,854,932
Gross Margin %	92.00%	92.00%	92.00%	92.00%	92.00%
Expenses					
Payroll	\$296,000	\$784,410	\$1,199,232	\$1,611,833	\$2,012,700
Payroll Taxes	\$29,600	\$78,441	\$119,923	\$161,183	\$201,270
Depreciation	\$0	\$3,000	\$4,500	\$6,000	\$7,500
Rent	\$24,000	\$28,800	\$34,560	\$41,472	\$49,766
Insurance	\$2,400	\$2,880	\$3,456	\$4,147	\$4,977
Marketing/Promotion	\$6,000	\$7,200	\$8,640	\$10,368	\$12,442
Utilities/Internet/Phone	\$1,800	\$2,160	\$2,592	\$3,110	\$3,732
Employees Education	\$0	\$8,000	\$9,600	\$11,520	\$13,824
Accountant	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000
Total Operating Expenses	\$362,800	\$917,891	\$1,385,503	\$1,852,633	\$2,309,211
Profit Before Interest and Taxes	\$111,000	\$141,811	\$204,919	\$333,842	\$545,722
EBITDA	\$111,000	\$144,811	\$209,419	\$339,842	\$553,222
Interest Expense	\$0	\$0	\$0	\$0	\$0
Taxes Incurred	\$29,970	\$38,289	\$55,328	\$90,137	\$147,345
Net Other Income	\$0	\$0	\$0	\$0	\$0
Net Profit	\$81,030	\$103,522	\$149,591	\$243,705	\$398,377
Net Profit/Sales	15.73%	8.99%	8.65%	10.25%	12.84%

7.2.2 Annual Expenses x Sales Chart



7.2.3 Annual Profit Chart



7.3 Cash Flow Assumptions

IntellexIA Health Technologies' cash flow projections demonstrate a consistent and positive financial trajectory, supported by a recurring revenue model, controlled operating expenses, and a disciplined approach to financial management. The company is structured to operate without external financing, relying exclusively on internally generated cash flow to support its growth.

Cash inflows are derived entirely from operating activities, reflecting the company's SaaS-based revenue model combined with implementation and consulting services. Total cash inflow is projected to increase from \$515,000 in Year 1 to \$3,103,187 in Year 5, in line with the company's sales growth and client acquisition strategy. Revenue is evenly distributed between cash sales and receivables, reflecting standard payment cycles within the healthcare industry.

On the expenditure side, the company's primary cash outflows are associated with payroll and operational expenses. Cash spending, largely driven by personnel costs, is projected to increase from \$296,000 in Year 1 to \$2,012,700 in Year 5, reflecting the planned expansion of the workforce.

In addition, bill payments, which include rent, marketing, utilities, professional services, and other operating expenses are expected to grow from \$128,638 in Year 1 to \$670,676 in Year 5, supporting the company's operational scaling.

Total operational cash expenditures are projected to increase from \$424,638 in Year 1 to \$2,683,376 in Year 5. The company also plans limited non-operational cash outflows in the form of dividend distributions, starting at \$20,000 in Year 1 and increasing to \$100,000 by Year 5, reflecting financial stability and profitability.

As a result, net cash flow remains positive throughout the projection period, increasing from \$70,362 in Year 1 to \$319,812 in Year 5. This consistent positive cash generation enables the company to strengthen its financial position over time.

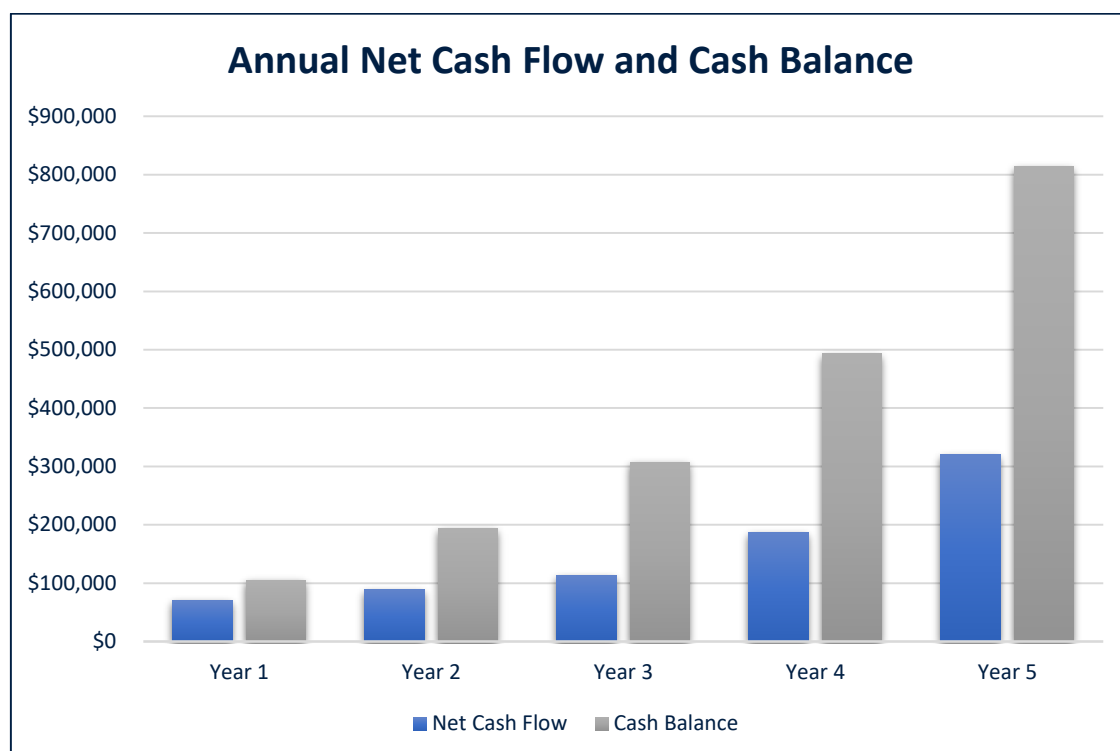
The company's cash balance is projected to grow steadily from \$105,362 in Year 1 to \$813,494 by Year 5, demonstrating strong liquidity and the ability to support ongoing operations, reinvest in growth, and manage potential market fluctuations.

Overall, the cash flow projections reflect a financially sustainable and operationally efficient business model, characterized by recurring revenue, controlled cost growth, and increasing liquidity. This structure positions IntellexIA Health Technologies to scale effectively while maintaining financial stability within the U.S. healthcare technology market.

7.3.1 Annual Cash Flow Table

<i>Pro Forma Cash Flow</i>					
	Year 1	Year 2	Year 3	Year 4	Year 5
Cash Received					
Cash from Operations					
Cash Sales	\$257,500	\$575,925	\$864,360	\$1,188,302	\$1,551,594
Cash from Receivables	\$257,500	\$575,925	\$864,360	\$1,188,302	\$1,551,594
Subtotal Cash from Operations	\$515,000	\$1,151,850	\$1,728,720	\$2,376,604	\$3,103,187
Additional Cash Received					
Non-Operating (Other) Income	\$0	\$0	\$0	\$0	\$0
Sales Tax, VAT, HST/GST Received	\$0	\$0	\$0	\$0	\$0
New Current Borrowing	\$0	\$0	\$0	\$0	\$0
New Other Liabilities (interest-free)	\$0	\$0	\$0	\$0	\$0
New Long-term Liabilities	\$0	\$0	\$0	\$0	\$0
Sales of Other Current Assets	\$0	\$0	\$0	\$0	\$0
Sales of Long-term Assets	\$0	\$0	\$0	\$0	\$0
New Investment Received	\$0	\$0	\$0	\$0	\$0
Subtotal Cash Received	\$515,000	\$1,151,850	\$1,728,720	\$2,376,604	\$3,103,187
Expenditures	Year 1	Year 2	Year 3	Year 4	Year 5
Expenditures from Operations					
Cash Spending	\$296,000	\$784,410	\$1,199,232	\$1,611,833	\$2,012,700
Bill Payments	\$128,638	\$248,804	\$365,988	\$503,587	\$670,676
Subtotal Spent on Operations	\$424,638	\$1,033,214	\$1,565,220	\$2,115,419	\$2,683,376
Additional Cash Spent					
Non-Operating (Other) Expense	\$0	\$0	\$0	\$0	\$0
Sales Tax, VAT, HST/GST Paid Out	\$0	\$0	\$0	\$0	\$0
Principal Repayment of Current Borrowing	\$0	\$0	\$0	\$0	\$0
Other Liabilities Principal Repayment	\$0	\$0	\$0	\$0	\$0
Long-term Liabilities Principal Repayment	\$0	\$0	\$0	\$0	\$0
Purchase Other Current Assets	\$0	\$0	\$0	\$0	\$0
Purchase Long-term Assets	\$0	\$0	\$0	\$0	\$0
Dividends	\$20,000	\$30,000	\$50,000	\$75,000	\$100,000
Subtotal Cash Spent	\$444,638	\$1,063,214	\$1,615,220	\$2,190,419	\$2,783,376
Net Cash Flow	\$70,362	\$88,636	\$113,500	\$186,185	\$319,812
Cash Balance	\$105,362	\$193,997	\$307,498	\$493,682	\$813,494

7.3.2 Annual Net Cash Flow and Cash Balance Chart



7.4 Balance Sheet Assumptions

The Pro Forma Balance Sheet for IntellexIA Health Technologies reflects a financially stable and sustainable business model, characterized by strong liquidity, no reliance on debt, and consistent growth in retained earnings over the first five years of operation.

Assets

The company's asset structure is primarily composed of current assets, with cash representing the most significant component. Cash balances are projected to increase steadily from approximately \$105,362 in Year 1 to \$813,494 in Year 5, driven by positive operating cash flow and disciplined expense management.

The company does not rely heavily on fixed assets, as its operations are primarily digital and service-based. Any long-term assets are limited to technology infrastructure and equipment, which are minimal in comparison to total assets. As a result, depreciation expenses remain low and do not significantly impact the company's financial position.

Liabilities

IntellexIA Health Technologies is structured to operate without external financing, and therefore no long-term debt is projected throughout the five-year period. Current liabilities are limited and primarily consist of short-term operational obligations such as accounts payable and accrued expenses.

This low-liability structure reflects a conservative financial strategy, reducing financial risk and ensuring that the company maintains full control over its operations without dependency on external lenders.

Equity

Shareholders' equity is expected to grow consistently over time, driven by retained earnings generated from profitable operations. As the company does not distribute excessive dividends in its early stages, a significant portion of net income is reinvested into the business to support product development, workforce expansion, and market growth.

Equity growth reflects the company's increasing valuation and financial strength, reinforcing its long-term sustainability and scalability.

Overall Financial Position

The balance sheet projections demonstrate a company with strong financial fundamentals, including high liquidity, low financial leverage, and consistent profitability. The alignment between cash flow, income generation, and asset growth supports a stable operational structure.

Overall, IntellexIA Health Technologies presents a low-risk and financially sound profile, well-positioned to support long-term expansion, adapt to market demands, and contribute to the advancement of healthcare technology solutions in the United States.

7.4.1 Annual Balance Sheet Table

<i>Pro Forma Balance Sheet</i>					
	Year 1	Year 2	Year 3	Year 4	Year 5
Assets					
Current Assets					
Cash	\$105,362	\$193,997	\$307,498	\$493,682	\$813,494
Accounts Receivable	\$0	\$0	\$0	\$0	\$0
Inventory	\$0	\$0	\$0	\$0	\$0
Other Current Assets	\$0	\$0	\$0	\$0	\$0
Total Current Assets	\$105,362	\$193,997	\$307,498	\$493,682	\$813,494
Long-term Assets					
Long-term Assets	\$0	\$0	\$0	\$0	\$0
Accumulated Depreciation	\$0	\$3,000	\$7,500	\$13,500	\$21,000
Total Long-term Assets	\$0	(\$3,000)	(\$7,500)	(\$13,500)	(\$21,000)
Total Assets	\$105,362	\$190,997	\$299,998	\$480,182	\$792,494
Liabilities and Capital	Year 1	Year 2	Year 3	Year 4	Year 5
Current Liabilities					
Accounts Payable	\$9,332	\$21,445	\$30,855	\$42,334	\$56,269
Current Borrowing	\$0	\$0	\$0	\$0	\$0
Other Current Liabilities	\$0	\$0	\$0	\$0	\$0
Subtotal Current Liabilities	\$9,332	\$21,445	\$30,855	\$42,334	\$56,269
Long-term Liabilities	\$0	\$0	\$0	\$0	\$0
Total Liabilities	\$9,332	\$21,445	\$30,855	\$42,334	\$56,269
Paid-in Capital	\$70,000	\$70,000	\$70,000	\$70,000	\$70,000
Retained Earnings	(\$55,000)	(\$3,970)	\$49,552	\$124,143	\$267,848
Earnings	\$81,030	\$103,522	\$149,591	\$243,705	\$398,377
Total Capital	\$96,030	\$169,552	\$269,143	\$437,848	\$736,225
Total Liabilities and Capital	\$105,362	\$190,997	\$299,998	\$480,182	\$792,494
Net Worth	\$96,030	\$169,552	\$269,143	\$437,848	\$736,225

8.0 Mr. Antonio de Azevedo Donatti's National-level Impact

Under the leadership of Mr. Antonio de Azevedo Donatti, IntellexIA Health Technologies is positioned to generate measurable national-level impact by improving the efficiency, scalability, and integration of the United States healthcare system through AI-driven SaaS platforms, automation, and clinical data interoperability.

The company's services directly address structural challenges recognized at the federal level, including administrative burden, fragmented health data, workforce shortages, and rising healthcare costs, issues consistently highlighted by agencies such as the U.S. Department of

Health and Human Services (HHS), Centers for Medicare & Medicaid Services (CMS), and the Office of the National Coordinator for Health Information Technology (ONC).¹⁹

1. Advancing U.S. Healthcare Digital Transformation

The U.S. government has established healthcare digital transformation and interoperability as national priorities, particularly through initiatives such as the 21st Century Cures Act, ONC Health IT Certification Program, and CMS interoperability regulations.

IntellexIA Health Technologies contributes to these priorities by:

- Deploying scalable SaaS platforms for AI-driven patient intake, triage, and scheduling
- Enabling integration between fragmented healthcare systems
- Supporting compliance with interoperability standards and regulatory frameworks
- Enhancing outpatient workflows through automation and data-driven decision-making

These capabilities align directly with federal efforts to improve access, exchange, and use of electronic health information, as well as increase transparency in AI-enabled clinical tools.²⁰

Additionally, CMS policies emphasize improving patient access to health data and reducing barriers to information exchange across providers and payers.²¹

2. Supporting Healthcare Cost Reduction and Operational Efficiency

Healthcare cost containment and operational efficiency remain central national concerns. Federal agencies have consistently identified administrative complexity and inefficiencies in care coordination as major contributors to rising costs.

IntellexIA Health Technologies supports these objectives by:

- Automating administrative and operational workflows
- Reducing inefficiencies in care coordination and patient management
- Supporting proactive and preventive care models
- Ensing resource allocation within healthcare organizations

These efforts align with CMS and HHS priorities to reduce administrative burden and improve healthcare system efficiency through technology adoption and innovation.

¹⁹ <https://www.manatt.com/insights/newsletters/health-highlights/manatt-health-health-ai-policy-tracker>

²⁰ <https://www.kff.org/patient-consumer-protections/charting-the-way-forward-new-efforts-to-advance-electronic-health-information-sharing/>

²¹ <https://www.cms.gov/newsroom/fact-sheets/interoperability-and-patient-access-fact-sheet>

3. Strengthening Data Interoperability and Clinical Integration

Fragmentation of patient data across systems remains one of the most significant challenges in U.S. healthcare.

Federal regulations, including ONC interoperability rules and CMS interoperability frameworks, emphasize the need for standardized, secure, and accessible data exchange across the healthcare ecosystem.

IntellexIA Health Technologies addresses this challenge by:

- Integrating clinical data systems across providers and care settings
- Enabling secure, standards-based data exchange (including API-driven architectures)
- Supporting interoperability frameworks aligned with national standards
- Enhancing continuity of care through unified patient data environments

These capabilities directly support federal mandates promoting interoperability, including API-based data exchange and improved access to patient health information.²²

4. Enhancing Workforce Productivity and Supporting Healthcare Providers

Workforce shortages and clinician burnout are widely recognized national challenges, particularly in primary care and outpatient environments.

IntellexIA Health Technologies contributes by:

- Automating repetitive administrative processes
- Reducing manual workload for clinical and administrative staff
- Providing decision-support tools that improve efficiency
- Enabling healthcare professionals to focus on patient care

Federal initiatives increasingly emphasize the use of AI and digital tools to enhance productivity, reduce burden, and improve healthcare delivery outcomes.

5. Economic Contribution and Innovation in Health Technology

IntellexIA Health Technologies also contributes to national economic growth and technological advancement by supporting innovation in healthcare AI and digital infrastructure.

The company aligns with federal priorities related to artificial intelligence and innovation, including:

- Expansion of AI adoption in healthcare systems

²²<https://icd10monitor.medlearn.com/ai-interoperability-and-the-new-reality-of-documentation-integrity-in-2026/>

- Development of secure and compliant digital infrastructure
- Creation of highly skilled jobs in software engineering and data science
- Support for small and mid-sized healthcare providers lacking internal IT capabilities

Federal strategies emphasize the importance of AI in improving healthcare outcomes, enhancing productivity, and driving innovation across the healthcare system.²³

6. National Importance and Public Interest Impact

The work performed by IntellexIA Health Technologies addresses systemic challenges that affect the entire U.S. healthcare system, including:

- Healthcare affordability and cost efficiency
- Access to care and continuity of treatment
- Workforce capacity and operational burden
- Interoperability and data integration

These challenges are national in scope and directly tied to federal healthcare spending, public health outcomes, and long-term system sustainability.

By delivering scalable, compliant, and AI-driven healthcare solutions, IntellexIA Health Technologies generates benefits that:

- Extend beyond individual clients and regions
- Support federal healthcare policy objectives
- Improve system-wide efficiency and sustainability
- Advance responsible adoption of artificial intelligence in healthcare

Overall, the company represents a high-impact, nationally relevant initiative, aligned with U.S. government priorities and positioned to contribute meaningfully to the modernization and long-term sustainability of the American healthcare system.

9.0 Indirect jobs creation - Economic Policy Institute

Each industry has backward linkages to economic sectors that provide the materials needed for the industry's output, just as each industry has forward linkages to the economic sectors where the industry's workers spend their income. Therefore, in addition to the jobs directly supported by an industry, a large number of indirect jobs may also be supported by that industry. The

²³ <https://www.cmadoocs.org/newsroom/news/view/ArticleId/50951/White-House-releases-AI-action-plan-with-focus-on-health-care>

subtraction or addition of jobs and output in industries with strong backward and forward linkages to other economic sectors can cause large ripple effects.

According to the national job multipliers published by the Economy Policy Institute (EPI) on January 23, 2019,²⁴ 100 direct jobs in the Computer system design, and related services industry generate a total of 283.4 total indirect jobs, as demonstrated in the following table:

Employment multipliers per 100 direct jobs, all private-sector industries

	Industry	Direct jobs	Supplier jobs*	Induced jobs**	Total indirect jobs
<i>Professional, scientific, and technical services</i>					
125	Legal services	100.0	89.2	111.3	200.5
126	Accounting, tax preparation, bookkeeping, and payroll services	100.0	52.0	81.3	133.4
127	Architectural, engineering, and related services	100.0	90.0	114.1	204.1
128	Specialized design services	100.0	67.5	97.4	164.9
129	Computer systems design and related services	100.0	134.1	149.3	283.4
130	Management, scientific, and technical consulting services	100.0	91.1	116.5	207.6
131	Scientific research and development services	100.0	519.3	323.7	842.9
132	Advertising, public relations, and related services	100.0	460.9	270.7	731.6
133	Other professional, scientific, and technical services	100.0	70.8	83.6	154.3

Since Mr. Donatti will create 18 direct jobs by the end of Year 5, the total number of indirect jobs to be generated in the same period will reach 51 according to the multipliers provided by the EPI. In addition to its in-house team, IntellexIA Health Technologies will hire a number of independent contractors on a project basis, including legal professionals and technicians. Additionally, the company will mediate in the hiring of professionals that will perform services that are deemed to be required. Therefore, the company will stimulate the employment of a number of workers of different profiles. Furthermore, the company will hire an outsourced marketing company to develop its website and work with marketing campaigns.

The direct and indirect job creation by IntellexIA Health Technologies, as well as the utilization of independent contractors and outsourced services, will have a significant positive impact on the local and national economy, fostering job growth, generating income, and contributing to overall economic prosperity.

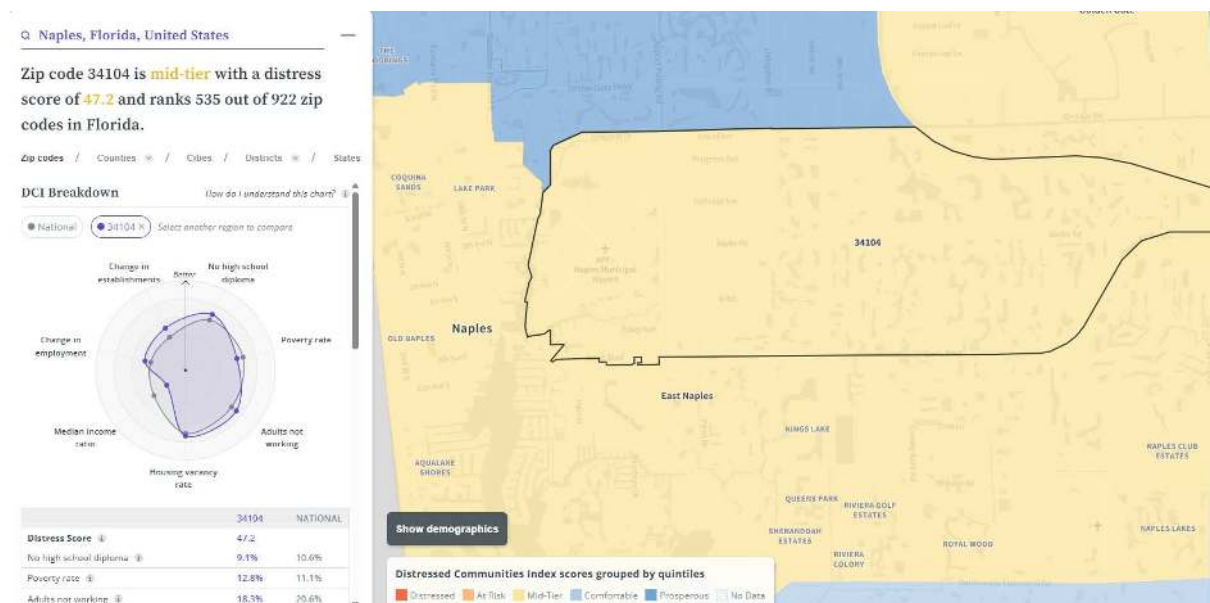
In conclusion, IntellexIA Health technologies' expansion plans, under the leadership of Mr. Antonio de Azevedo Donatti, encompass the creation of direct and indirect employment opportunities, the payment of substantial taxes, and the utilization of local resources and services. By contributing to job creation, tax revenue, and economic growth, IntellexIA Health

²⁴ <https://www.epi.org/publication/updated-employment-multipliers-for-the-u-s-economy/>

Technologies aims to make a lasting and positive impact on both the local community and the broader U.S. economy.

9.1 Distressed Communities

This section presents an analysis of the demographic and socioeconomic conditions of Naples, Florida, ZIP code 34104, which has been classified as a mid-tier area according to the Distressed Communities Index (DCI). ZIP code 34104 has a distress score of 47.2 and ranks 535 out of 922 ZIP codes in Florida, indicating moderate economic conditions with both stability indicators and opportunities for targeted economic and community-oriented initiatives.²⁵



Demographic and Socioeconomic Profile

- DCI Score and Economic Conditions:** A distress score of 47.2 places ZIP code 34104 in the mid-tier category, reflecting balanced economic conditions with moderate levels of income stability, employment activity, and community resilience compared to state and national benchmarks.
- Education Levels:** Approximately 9.1% of adults lack a high school diploma, which is lower than the national average of 10.6%, indicating a relatively educated population. Additionally, 26.2% hold a high school diploma, 28.2% have some college education, and 35.0% possess a bachelor's degree or higher, demonstrating a well-qualified and adaptable workforce.
- Income and Poverty:** The poverty rate stands at 12.8%, slightly above the national average of 11.1%. The median income ratio is 81.6% of the national average, suggesting moderate purchasing power and a stable consumer base with sensitivity to cost-effective and value-driven services.

²⁵<https://eig.org/distressed-communities-interactive/?regions%5B0%5D=34104&geo=zctas&lat=26.15&lon=-81.74&z=13.16>

• **Employment Conditions:** The share of adults not working is 18.3%, lower than the national benchmark of 20.6%, indicating relatively strong labor force participation. Notably, employment has grown by 10.3%, significantly exceeding the national average of 5.1%, reflecting positive economic momentum and job creation in the region.

• **Housing and Business Activity:** The housing vacancy rate is 6.5%, slightly below the national average of 7.0%, indicating stable housing demand. Additionally, the number of business establishments has increased by 10.3%, outperforming the national average of 5.0%, which signals an active and expanding local business environment.

• **Demographic Composition:** ZIP code 34104 presents a diverse population, with 58.2% non-Hispanic White, 19.0% Hispanic or Latino, 12.0% Black or African American, 5.9% Asian or Pacific Islander, and smaller shares of other racial groups. Approximately 13.9% of residents are foreign-born, reflecting a moderately diverse and multicultural community.

Business and Community Implications

• **Market Demand for Scalable and Efficient Services:** The combination of moderate income levels and steady economic growth creates demand for technology-driven, cost-efficient solutions, particularly in sectors such as healthcare, digital services, and operational efficiency.

• **Workforce Availability and Skill Level:** The relatively high percentage of residents with college education supports the availability of skilled labor, particularly in technology, data, and administrative roles, facilitating business growth and innovation.

• **Economic Growth and Expansion Opportunities:** Strong employment growth and increasing business establishments indicate a favorable environment for new ventures, particularly those offering scalable and high-value services.

• **Community Impact Potential:** Businesses operating in ZIP code 34104 have the opportunity to contribute to continued economic development by creating high-skilled jobs, supporting workforce participation, and introducing innovative solutions that improve efficiency and access to services.

• **Diversity and Market Accessibility:** The area's demographic diversity supports the implementation of inclusive and adaptable business strategies, including culturally responsive communication and service delivery.

Operating in Naples' ZIP code 34104 presents a stable and growth-oriented environment, combining favorable economic indicators with opportunities for continued development. Companies that leverage technology, invest in workforce development, and deliver efficient, scalable solutions are well-positioned to achieve sustainable growth while contributing to the region's ongoing economic expansion.

APPENDIX

Monthly Sales Forecast Table

Sales Forecast		Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Unit Sales													
SaaS – Small & Mid Clients		0	0	1	0	1	0	1	0	0	1	0	1
SaaS – Enterprise Clients		0	0	0	0	0	0	0	0	1	0	0	0
Implementation & Integration		0	1	0	1	0	1	0	0	1	0	1	0
Consulting & Customization		1	0	0	1	1	0	0	1	0	0	0	0
Total Unit Sales		1	1	1	2	2	1	1	1	2	1	1	1
Unit Prices													
SaaS – Small & Mid Clients		\$42,000.00	\$42,000.00	\$42,000.00	\$42,000.00	\$42,000.00	\$42,000.00	\$42,000.00	\$42,000.00	\$42,000.00	\$42,000.00	\$42,000.00	\$42,000.00
SaaS – Enterprise Clients		\$120,000.00	\$120,000.00	\$120,000.00	\$120,000.00	\$120,000.00	\$120,000.00	\$120,000.00	\$120,000.00	\$120,000.00	\$120,000.00	\$120,000.00	\$120,000.00
Implementation & Integration		\$25,000.00	\$25,000.00	\$25,000.00	\$25,000.00	\$25,000.00	\$25,000.00	\$25,000.00	\$25,000.00	\$25,000.00	\$25,000.00	\$25,000.00	\$25,000.00
Consulting & Customization		\$15,000.00	\$15,000.00	\$15,000.00	\$15,000.00	\$15,000.00	\$15,000.00	\$15,000.00	\$15,000.00	\$15,000.00	\$15,000.00	\$15,000.00	\$15,000.00
Sales													
SaaS – Small & Mid Clients		\$0	\$0	\$42,000	\$0	\$42,000	\$0	\$42,000	\$0	\$0	\$42,000	\$0	\$42,000
SaaS – Enterprise Clients		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$120,000	\$0	\$0	\$0
Implementation & Integration		\$0	\$25,000	\$0	\$25,000	\$0	\$25,000	\$0	\$0	\$25,000	\$0	\$25,000	\$0
Consulting & Customization		\$15,000	\$0	\$0	\$15,000	\$15,000	\$0	\$0	\$15,000	\$0	\$0	\$0	\$0
Total Sales		\$15,000	\$25,000	\$42,000	\$40,000	\$57,000	\$25,000	\$42,000	\$15,000	\$145,000	\$42,000	\$25,000	\$42,000
Direct Unit Costs													
SaaS – Small & Mid Clients	8.00%	\$3,360.00	\$3,360.00	\$3,360.00	\$3,360.00	\$3,360.00	\$3,360.00	\$3,360.00	\$3,360.00	\$3,360.00	\$3,360.00	\$3,360.00	\$3,360.00
SaaS – Enterprise Clients	8.00%	\$9,600.00	\$9,600.00	\$9,600.00	\$9,600.00	\$9,600.00	\$9,600.00	\$9,600.00	\$9,600.00	\$9,600.00	\$9,600.00	\$9,600.00	\$9,600.00

Implementation & Integration	8.00%	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00
Consulting & Customization	8.00%	\$1,200.00	\$1,200.00	\$1,200.00	\$1,200.00	\$1,200.00	\$1,200.00	\$1,200.00	\$1,200.00	\$1,200.00	\$1,200.00	\$1,200.00	\$1,200.00
Direct Cost of Sales													
SaaS – Small & Mid Clients		\$0	\$0	\$3,360	\$0	\$3,360	\$0	\$3,360	\$0	\$0	\$3,360	\$0	\$3,360
SaaS – Enterprise Clients		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$9,600	\$0	\$0	\$0
Implementation & Integration		\$0	\$2,000	\$0	\$2,000	\$0	\$2,000	\$0	\$0	\$2,000	\$0	\$2,000	\$0
Consulting & Customization		\$1,200	\$0	\$0	\$1,200	\$1,200	\$0	\$0	\$1,200	\$0	\$0	\$0	\$0
Subtotal Direct Cost of Sales		\$1,200	\$2,000	\$3,360	\$3,200	\$4,560	\$2,000	\$3,360	\$1,200	\$11,600	\$3,360	\$2,000	\$3,360

Monthly Personnel Plan Table

Personnel Plan		Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
General Manager and Head of Product and Technology - Mr. Antonio de Azevedo Donatti		\$0	\$6,000	\$6,000	\$8,000	\$8,000	\$10,000	\$10,000	\$10,000	\$12,000	\$12,000	\$14,000	\$14,000
Software Engineer		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Data Analyst / Data Engineer		\$0	\$0	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500
Regulatory & Compliance Specialist		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Product Manager		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Customer Success / Support Specialist		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Sales / Business Development Manager		\$6,800	\$6,800	\$6,800	\$6,800	\$6,800	\$6,800	\$6,800	\$6,800	\$6,800	\$6,800	\$6,800	\$6,800
Administrative / Operations Support		\$0	\$0	\$0	\$0	\$0	\$4,200	\$4,200	\$4,200	\$4,200	\$4,200	\$4,200	\$4,200
Total People		2	2	3	3	3	4	4	4	4	4	4	4
Total Payroll		\$6,800	\$12,800	\$20,300	\$22,300	\$22,300	\$28,500	\$28,500	\$28,500	\$30,500	\$30,500	\$32,500	\$32,500

Monthly Profit and Loss Table

<i>Pro Forma Profit and Loss</i>		Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Sales		\$15,000	\$25,000	\$42,000	\$40,000	\$57,000	\$25,000	\$42,000	\$15,000	\$145,000	\$42,000	\$25,000	\$42,000
Direct Cost of Sales		\$1,200	\$2,000	\$3,360	\$3,200	\$4,560	\$2,000	\$3,360	\$1,200	\$11,600	\$3,360	\$2,000	\$3,360
Other Costs of Sales		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total Cost of Sales		\$1,200	\$2,000	\$3,360	\$3,200	\$4,560	\$2,000	\$3,360	\$1,200	\$11,600	\$3,360	\$2,000	\$3,360
Gross Margin		\$13,800	\$23,000	\$38,640	\$36,800	\$52,440	\$23,000	\$38,640	\$13,800	\$133,400	\$38,640	\$23,000	\$38,640
Gross Margin %		92.00%	92.00%	92.00%	92.00%	92.00%	92.00%	92.00%	92.00%	92.00%	92.00%	92.00%	92.00%
Expenses													
Payroll		\$6,800	\$12,800	\$20,300	\$22,300	\$22,300	\$28,500	\$28,500	\$28,500	\$30,500	\$30,500	\$32,500	\$32,500
Payroll Taxes	10%	\$680	\$1,280	\$2,030	\$2,230	\$2,230	\$2,850	\$2,850	\$2,850	\$3,050	\$3,050	\$3,250	\$3,250
Depreciation		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Rent		\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000
Insurance		\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200
Marketing/Promotion		\$500	\$500	\$500	\$500	\$500	\$500	\$500	\$500	\$500	\$500	\$500	\$500
Utilities/Internet/Phone		\$150	\$150	\$150	\$150	\$150	\$150	\$150	\$150	\$150	\$150	\$150	\$150
Employees Education	0%	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Accountant	0%	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250
Total Operating Expenses		\$10,580	\$17,180	\$25,430	\$27,630	\$27,630	\$34,450	\$34,450	\$34,450	\$36,650	\$36,650	\$38,850	\$38,850
Profit Before Interest and Taxes		\$3,220	\$5,820	\$13,210	\$9,170	\$24,810	(\$11,450)	\$4,190	(\$20,650)	\$96,750	\$1,990	(\$15,850)	(\$210)
EBITDA		\$3,220	\$5,820	\$13,210	\$9,170	\$24,810	(\$11,450)	\$4,190	(\$20,650)	\$96,750	\$1,990	(\$15,850)	(\$210)
Interest Expense		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Taxes Incurred		\$869	\$1,571	\$3,567	\$2,476	\$6,699	(\$3,092)	\$1,131	(\$5,576)	\$26,123	\$537	(\$4,280)	(\$57)
Net Profit		\$2,351	\$4,249	\$9,643	\$6,694	\$18,111	(\$8,359)	\$3,059	(\$15,075)	\$70,628	\$1,453	(\$11,571)	(\$153)
Net Profit/Sales		15.67%	16.99%	22.96%	16.74%	31.77%	-33.43%	7.28%	-100.50%	48.71%	3.46%	-46.28%	-0.37%

Monthly Cash Flow Table

<i>Pro Forma Cash Flow</i>		Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Cash Received													
Cash from Operations													
Cash Sales		\$7,500	\$12,500	\$21,000	\$20,000	\$28,500	\$12,500	\$21,000	\$7,500	\$72,500	\$21,000	\$12,500	\$21,000
Cash from Receivables		\$7,500	\$12,500	\$21,000	\$20,000	\$28,500	\$12,500	\$21,000	\$7,500	\$72,500	\$21,000	\$12,500	\$21,000
Subtotal Cash from Operations		\$15,000	\$25,000	\$42,000	\$40,000	\$57,000	\$25,000	\$42,000	\$15,000	\$145,000	\$42,000	\$25,000	\$42,000
Additional Cash Received													
Non-Operating (Other) Income		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Sales Tax, VAT, HST/GST Received	0.00%	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
New Current Borrowing		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
New Other Liabilities (interest-free)		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
New Long-term Liabilities		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Sales of Other Current Assets		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Sales of Long-term Assets		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
New Investment Received		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Subtotal Cash Received		\$15,000	\$25,000	\$42,000	\$40,000	\$57,000	\$25,000	\$42,000	\$15,000	\$145,000	\$42,000	\$25,000	\$42,000
Expenditures		Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Expenditures from Operations													
Cash Spending		\$6,800	\$12,800	\$20,300	\$22,300	\$22,300	\$28,500	\$28,500	\$28,500	\$30,500	\$30,500	\$32,500	\$32,500
Bill Payments		\$195	\$5,919	\$8,088	\$12,022	\$11,192	\$16,198	\$5,045	\$10,146	\$2,984	\$42,745	\$9,848	\$4,257
Subtotal Spent on Operations		\$6,995	\$18,719	\$28,388	\$34,322	\$33,492	\$44,698	\$33,545	\$38,646	\$33,484	\$73,245	\$42,348	\$36,757
Additional Cash Spent													
Non-Operating (Other) Expense		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Sales Tax, VAT, HST/GST Paid Out		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Principal Repayment of Current Borrowing		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other Liabilities Principal Repayment		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Long-term Liabilities Principal Repayment		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Purchase Other Current Assets		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Purchase Long-term Assets		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Dividends		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$20,000
Subtotal Cash Spent		\$6,995	\$18,719	\$28,388	\$34,322	\$33,492	\$44,698	\$33,545	\$38,646	\$33,484	\$73,245	\$42,348	\$56,757
Net Cash Flow		\$8,005	\$6,281	\$13,612	\$5,678	\$23,508	(\$19,698)	\$8,455	(\$23,646)	\$111,516	(\$31,245)	(\$17,348)	(\$14,757)
Cash Balance		\$43,005	\$49,286	\$62,897	\$68,576	\$92,084	\$72,386	\$80,841	\$57,196	\$168,711	\$137,466	\$120,118	\$105,362

Monthly Balance Sheet Table

Pro Forma Balance Sheet													
		Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Assets	Starting Balances												
Current Assets													
Cash	\$35,000	\$43,005	\$49,286	\$62,897	\$68,576	\$92,084	\$72,386	\$80,841	\$57,196	\$168,711	\$137,466	\$120,118	\$105,362
Accounts Receivable	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Inventory	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other Current Assets	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total Current Assets	\$35,000	\$43,005	\$49,286	\$62,897	\$68,576	\$92,084	\$72,386	\$80,841	\$57,196	\$168,711	\$137,466	\$120,118	\$105,362
Long-term Assets													
Long-term Assets	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Accumulated Depreciation	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total Long-term Assets	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total Assets	\$35,000	\$43,005	\$49,286	\$62,897	\$68,576	\$92,084	\$72,386	\$80,841	\$57,196	\$168,711	\$137,466	\$120,118	\$105,362
Liabilities and Capital		Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Current Liabilities													
Accounts Payable	\$0	\$5,654	\$7,686	\$11,655	\$10,639	\$16,036	\$4,697	\$10,093	\$1,522	\$42,410	\$9,712	\$3,935	\$9,332
Current Borrowing	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other Current Liabilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Subtotal Current Liabilities	\$0	\$5,654	\$7,686	\$11,655	\$10,639	\$16,036	\$4,697	\$10,093	\$1,522	\$42,410	\$9,712	\$3,935	\$9,332
Long-term Liabilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total Liabilities	\$0	\$5,654	\$7,686	\$11,655	\$10,639	\$16,036	\$4,697	\$10,093	\$1,522	\$42,410	\$9,712	\$3,935	\$9,332
Paid-in Capital	\$70,000	\$70,000	\$70,000	\$70,000	\$70,000	\$70,000	\$70,000	\$70,000	\$70,000	\$70,000	\$70,000	\$70,000	\$70,000
Retained Earnings	(\$35,000)	(\$35,000)	(\$35,000)	(\$35,000)	(\$35,000)	(\$35,000)	(\$35,000)	(\$35,000)	(\$35,000)	(\$35,000)	(\$35,000)	(\$35,000)	(\$55,000)
Earnings	\$0	\$2,351	\$6,599	\$16,243	\$22,937	\$41,048	\$32,689	\$35,748	\$20,674	\$91,301	\$92,754	\$81,183	\$81,030
Total Capital	\$35,000	\$37,351	\$41,599	\$51,243	\$57,937	\$76,048	\$67,689	\$70,748	\$55,674	\$126,301	\$127,754	\$116,183	\$96,030
Total Liabilities and Capital	\$35,000	\$43,005	\$49,286	\$62,897	\$68,576	\$92,084	\$72,386	\$80,841	\$57,196	\$168,711	\$137,466	\$120,118	\$105,362
Net Worth	\$35,000	\$37,351	\$41,599	\$51,243	\$57,937	\$76,048	\$67,689	\$70,748	\$55,674	\$126,301	\$127,754	\$116,183	\$96,030

DHS STEM Designated Degree Program List

Last Updated: July 22, 2024

The U.S. Department of Homeland Security (DHS) STEM Designated Degree Program List is a complete list of fields of study that DHS considers to be science, technology, engineering or mathematics (STEM) fields of study for purposes of the 24-month STEM optional practical training extension described at 8 CFR 214.2(f). Under 8 CFR 214.2(f)(10)(ii)(C)(2), a STEM field of study is one “included in the Department of Education’s Classification of Instructional Programs taxonomy within the two-digit series containing engineering, biological sciences, mathematics, and physical sciences, or a related field. In general, related fields will include fields involving research, innovation, or development of new technologies using engineering, mathematics, computer science, or natural sciences (including physical, biological, and agricultural sciences).”

Accordingly, this list designates the following four primary CIP series at the 2-digit CIP code level: Engineering (14), Biological and Biomedical Sciences (26), Mathematics and Statistics (27) and Physical Sciences (40). Any new additions to those areas will automatically be included on this STEM Designated Degree Program List.

This list also includes CIPs from the following 18 related CIP series at the 6-digit CIP code level: Agricultural/Animal/Plant/Veterinary Science and Related Fields (01); Natural Resources and Conservation (03); Architecture and Related Services (04); Communication, Journalism and Related Programs (09); Communications Technologies/Technicians and Support Services (10); Computer and Information Sciences and Support Services (11); Education (13); Engineering/Engineering-Related Technologies/Technicians (15); Military Science, Leadership and Operational Art (28); Military Technologies and Applied Sciences (29); Multi/Interdisciplinary Studies (30); Science Technologies/Technicians (41); Psychology (42); Homeland Security, Law Enforcement, Firefighting and Related Protective Services (43); Social Sciences (45); Transportation and Materials Moving (49); Health Professions and Related Programs (51); and Business, Management, Marketing and Related Support Services (52).

CIP Code Two-Digit Series	2020 CIP Code	CIP Code Title
01	01.0308	Agroecology and Sustainable Agriculture.
01	01.0901	Animal Sciences, General.
01	01.0902	Agricultural Animal Breeding.
01	01.0903	Animal Health.
01	01.0904	Animal Nutrition.
01	01.0905	Dairy Science.
01	01.0906	Livestock Management.
01	01.0907	Poultry Science.
01	01.0999	Animal Sciences, Other.
01	01.1001	Food Science.
01	01.1002	Food Technology and Processing.



CIP Code Two-Digit Series	2020 CIP Code	CIP Code Title
01	01.1099	Food Science and Technology, Other.
01	01.1101	Plant Sciences, General.
01	01.1102	Agronomy and Crop Science.
01	01.1103	Horticultural Science.
01	01.1104	Agricultural and Horticultural Plant Breeding.
01	01.1105	Plant Protection and Integrated Pest Management.
01	01.1106	Range Science and Management.
01	01.1199	Plant Sciences, Other.
01	01.1201	Soil Science and Agronomy, General.
01	01.1202	Soil Chemistry and Physics.
01	01.1203	Soil Microbiology.
01	01.1299	Soil Sciences, Other.
01	01.8105	Veterinary Anatomy.
01	01.8106	Veterinary Infectious Diseases.
01	01.8107	Veterinary Microbiology and Immunobiology.
01	01.8108	Veterinary Pathology and Pathobiology.
01	01.8109	Veterinary Physiology.
01	01.8110	Veterinary Preventive Medicine, Epidemiology, and Public Health.
01	01.8111	Veterinary Toxicology and Pharmacology.
03	03.0101	Natural Resources/Conservation, General.
03	03.0103	Environmental Studies.
03	03.0104	Environmental Science.
03	03.0199	Natural Resources Conservation and Research, Other.
03	03.0204	Environmental/Natural Resource Economics.
03	03.0205	Water, Wetlands, and Marine Resources Management.
03	03.0210	Bioenergy.
03	03.0501	Forestry, General.
03	03.0502	Forest Sciences and Biology.
03	03.0508	Urban Forestry.
03	03.0509	Wood Science and Wood Products/Pulp and Paper Technology/Technician.
03	03.0510	Forest Resources Production and Management.
03	03.0601	Wildlife, Fish and Wildlands Science and Management.
04	04.0601	Landscape Architecture.
04	04.0902	Architectural and Building Sciences/Technology.
09	09.0702	Digital Communication and Media/Multimedia.
10	10.0304	Animation, Interactive Technology, Video Graphics, and Special Effects.

CIP Code Two-Digit Series	2020 CIP Code	CIP Code Title
11	11.0101	Computer and Information Sciences, General.
11	11.0102	Artificial Intelligence.
11	11.0103	Information Technology.
11	11.0104	Informatics.
11	11.0105	Human-Centered Technology Design.
11	11.0199	Computer and Information Sciences, Other.
11	11.0201	Computer Programming/Programmer, General.
11	11.0202	Computer Programming, Specific Applications.
11	11.0203	Computer Programming, Vendor/Product Certification.
11	11.0299	Computer Programming, Other.
11	11.0301	Data Processing and Data Processing Technology/ Technician.
11	11.0401	Information Science/Studies.
11	11.0501	Computer Systems Analysis/Analyst.
11	11.0701	Computer Science.
11	11.0801	Web Page, Digital/Multimedia and Information Resources Design.
11	11.0802	Data Modeling/Warehousing and Database Administration.
11	11.0803	Computer Graphics.
11	11.0804	Modeling, Virtual Environments and Simulation.
11	11.0899	Computer Software and Media Applications, Other.
11	11.0901	Computer Systems Networking and Telecommunications.
11	11.0902	Cloud Computing.
11	11.1001	Network and System Administration/Administrator.
11	11.1002	System, Networking, and LAN/WAN Management/Manager.
11	11.1003	Computer and Information Systems Security/Auditing/Information Assurance.
11	11.1004	Web/Multimedia Management and Webmaster.
11	11.1005	Information Technology Project Management.
11	11.1006	Computer Support Specialist.
11	11.1099	Computer/Information Technology Services Administration and Management, Other.
13	13.0501	Educational/Instructional Technology.
13	13.0601	Educational Evaluation and Research.
13	13.0603	Educational Statistics and Research Methods.
13	13.0608	Institutional Research.
14	14.0000	ENGINEERING.
14	14.0100	Engineering, General.



CIP Code Two-Digit Series	2020 CIP Code	CIP Code Title
14	14.0101	Engineering, General.
14	14.0102	Pre-Engineering.
14	14.0103	Applied Engineering.
14	14.0200	Aerospace, Aeronautical, and Astronautical/Space Engineering.
14	14.0201	Aerospace, Aeronautical, and Astronautical/Space Engineering, General.
14	14.0202	Astronautical Engineering.
14	14.0299	Aerospace, Aeronautical, and Astronautical/Space Engineering, Other.
14	14.0300	Agricultural Engineering.
14	14.0301	Agricultural Engineering.
14	14.0400	Architectural Engineering.
14	14.0401	Architectural Engineering.
14	14.0500	Biomedical/Medical Engineering.
14	14.0501	Bioengineering and Biomedical Engineering.
14	14.0600	Ceramic Sciences and Engineering.
14	14.0601	Ceramic Sciences and Engineering.
14	14.0700	Chemical Engineering.
14	14.0701	Chemical Engineering.
14	14.0702	Chemical and Biomolecular Engineering.
14	14.0799	Chemical Engineering, Other.
14	14.0800	Civil Engineering.
14	14.0801	Civil Engineering, General.
14	14.0802	Geotechnical and Geoenvironmental Engineering.
14	14.0803	Structural Engineering.
14	14.0804	Transportation and Highway Engineering.
14	14.0805	Water Resources Engineering.
14	14.0899	Civil Engineering, Other.
14	14.0900	Computer Engineering.
14	14.0901	Computer Engineering, General.
14	14.0902	Computer Hardware Engineering.
14	14.0903	Computer Software Engineering.
14	14.0999	Computer Engineering, Other.
14	14.1000	Electrical, Electronics, and Communications Engineering.
14	14.1001	Electrical and Electronics Engineering.
14	14.1003	Laser and Optical Engineering.
14	14.1004	Telecommunications Engineering.



CIP Code Two-Digit Series	2020 CIP Code	CIP Code Title
14	14.1099	Electrical, Electronics, and Communications Engineering, Other.
14	14.1100	Engineering Mechanics.
14	14.1101	Engineering Mechanics.
14	14.1200	Engineering Physics.
14	14.1201	Engineering Physics/Applied Physics.
14	14.1300	Engineering Science.
14	14.1301	Engineering Science.
14	14.1400	Environmental/Environmental Health Engineering.
14	14.1401	Environmental/Environmental Health Engineering.
14	14.1800	Materials Engineering.
14	14.1801	Materials Engineering.
14	14.1900	Mechanical Engineering.
14	14.1901	Mechanical Engineering.
14	14.2000	Metallurgical Engineering.
14	14.2001	Metallurgical Engineering.
14	14.2100	Mining and Mineral Engineering.
14	14.2101	Mining and Mineral Engineering.
14	14.2200	Naval Architecture and Marine Engineering.
14	14.2201	Naval Architecture and Marine Engineering.
14	14.2300	Nuclear Engineering.
14	14.2301	Nuclear Engineering.
14	14.2400	Ocean Engineering.
14	14.2401	Ocean Engineering.
14	14.2500	Petroleum Engineering.
14	14.2501	Petroleum Engineering.
14	14.2700	Systems Engineering.
14	14.2701	Systems Engineering.
14	14.2800	Textile Sciences and Engineering.
14	14.2801	Textile Sciences and Engineering.
14	14.3200	Polymer/Plastics Engineering.
14	14.3201	Polymer/Plastics Engineering.
14	14.3300	Construction Engineering.
14	14.3301	Construction Engineering.
14	14.3400	Forest Engineering.
14	14.3401	Forest Engineering.
14	14.3500	Industrial Engineering.



CIP Code Two-Digit Series	2020 CIP Code	CIP Code Title
14	14.3501	Industrial Engineering.
14	14.3600	Manufacturing Engineering.
14	14.3601	Manufacturing Engineering.
14	14.3700	Operations Research.
14	14.3701	Operations Research.
14	14.3800	Surveying Engineering.
14	14.3801	Surveying Engineering.
14	14.3900	Geological/Geophysical Engineering.
14	14.3901	Geological/Geophysical Engineering.
14	14.4000	Paper Science and Engineering.
14	14.4001	Paper Science and Engineering.
14	14.4100	Electromechanical Engineering.
14	14.4101	Electromechanical Engineering.
14	14.4200	Mechatronics, Robotics, and Automation Engineering.
14	14.4201	Mechatronics, Robotics, and Automation Engineering.
14	14.4300	Biochemical Engineering.
14	14.4301	Biochemical Engineering.
14	14.4400	Engineering Chemistry.
14	14.4401	Engineering Chemistry.
14	14.4500	Biological/Biosystems Engineering.
14	14.4501	Biological/Biosystems Engineering.
14	14.4700	Electrical and Computer Engineering.
14	14.4701	Electrical and Computer Engineering.
14	14.4800	Energy Systems Engineering.
14	14.4801	Energy Systems Engineering, General.
14	14.4802	Power Plant Engineering.
14	14.4899	Energy Systems Engineering, Other.
14	14.9900	Engineering, Other.
14	14.9999	Engineering, Other.
15	15.0000	Engineering Technologies/Technicians, General.
15	15.0101	Architectural Engineering Technologies/Technicians.
15	15.0201	Civil Engineering Technologies/Technicians.
15	15.0303	Electrical, Electronic, and Communications Engineering Technology/Technician.
15	15.0304	Laser and Optical Technology/Technician.
15	15.0305	Telecommunications Technology/Technician.



CIP Code Two-Digit Series	2020 CIP Code	CIP Code Title
15	15.0306	Integrated Circuit Design Technology/Technician.
15	15.0399	Electrical/Electronic Engineering Technologies/Technicians, Other.
15	15.0401	Biomedical Technology/Technician.
15	15.0403	Electromechanical/Electromechanical Engineering Technology/Technician.
15	15.0404	Instrumentation Technology/Technician.
15	15.0405	Robotics Technology/Technician.
15	15.0406	Automation Engineer Technology/Technician.
15	15.0407	Mechatronics, Robotics, and Automation Engineering Technology/Technician.
15	15.0499	Electromechanical Technologies/Technicians, Other.
15	15.0501	Heating, Ventilation, Air Conditioning and Refrigeration Engineering Technology/Technician.
15	15.0506	Water Quality and Wastewater Treatment Management and Recycling Technology/Technician.
15	15.0507	Environmental/Environmental Engineering Technology/Technician.
15	15.0508	Hazardous Materials Management and Waste Technology/Technician.
15	15.0599	Environmental Control Technologies/Technicians, Other.
15	15.0607	Plastics and Polymer Engineering Technology/Technician.
15	15.0611	Metallurgical Technology/Technician.
15	15.0612	Industrial Technology/Technician.
15	15.0613	Manufacturing Engineering Technology/Technician.
15	15.0614	Welding Engineering Technology/Technician.
15	15.0615	Chemical Engineering Technology/Technician.
15	15.0616	Semiconductor Manufacturing Technology/Technician.
15	15.0617	Composite Materials Technology/Technician.
15	15.0699	Industrial Production Technologies/Technicians, Other.
15	15.0701	Occupational Safety and Health Technology/Technician.
15	15.0702	Quality Control Technology/Technician.
15	15.0703	Industrial Safety Technology/Technician.
15	15.0704	Hazardous Materials Information Systems Technology/Technician.
15	15.0799	Quality Control and Safety Technologies/Technicians, Other.
15	15.0801	Aeronautical/Aerospace Engineering Technology/Technician.
15	15.0803	Automotive Engineering Technology/Technician.
15	15.0805	Mechanical/Mechanical Engineering Technology/Technician.
15	15.0899	Mechanical Engineering Related Technologies/Technicians, Other.
15	15.0901	Mining Technology/Technician.
15	15.0903	Petroleum Technology/Technician.



CIP Code Two-Digit Series	2020 CIP Code	CIP Code Title
15	15.0999	Mining and Petroleum Technologies/Technicians, Other.
15	15.1001	Construction Engineering Technology/Technician.
15	15.1102	Surveying Technology/Surveying.
15	15.1103	Hydraulics and Fluid Power Technology/Technician.
15	15.1199	Engineering-Related Technologies/Technicians, Other.
15	15.1201	Computer Engineering Technology/Technician.
15	15.1202	Computer/Computer Systems Technology/Technician.
15	15.1203	Computer Hardware Technology/Technician.
15	15.1204	Computer Software Technology/Technician.
15	15.1299	Computer Engineering Technologies/Technicians, Other.
15	15.1301	Drafting and Design Technology/Technician, General.
15	15.1302	CAD/CADD Drafting and/or Design Technology/Technician.
15	15.1303	Architectural Drafting and Architectural CAD/CADD.
15	15.1304	Civil Drafting and Civil Engineering CAD/CADD.
15	15.1305	Electrical/Electronics Drafting and Electrical/Electronics CAD/CADD.
15	15.1306	Mechanical Drafting and Mechanical Drafting CAD/CADD.
15	15.1399	Drafting/Design Engineering Technologies/Technicians, Other.
15	15.1401	Nuclear Engineering Technology/Technician.
15	15.1501	Engineering/Industrial Management.
15	15.1502	Engineering Design.
15	15.1503	Packaging Science.
15	15.1599	Engineering-Related Fields, Other.
15	15.1601	Nanotechnology.
15	15.1701	Energy Systems Technology/Technician.
15	15.1703	Solar Energy Technology/Technician.
15	15.9999	Engineering/Engineering-Related Technologies/Technicians, Other.
26	26.0000	BIOLOGICAL AND BIOMEDICAL SCIENCES.
26	26.0100	Biology, General.
26	26.0101	Biology/Biological Sciences, General.
26	26.0102	Biomedical Sciences, General.
26	26.0200	Biochemistry, Biophysics and Molecular Biology.
26	26.0202	Biochemistry.
26	26.0203	Biophysics.
26	26.0204	Molecular Biology.
26	26.0205	Molecular Biochemistry.
26	26.0206	Molecular Biophysics.
26	26.0207	Structural Biology.
26	26.0208	Photobiology.



CIP Code Two-Digit Series	2020 CIP Code	CIP Code Title
26	26.0209	Radiation Biology/Radiobiology.
26	26.0210	Biochemistry and Molecular Biology.
26	26.0299	Biochemistry, Biophysics and Molecular Biology, Other.
26	26.0300	Botany/Plant Biology.
26	26.0301	Botany/Plant Biology.
26	26.0305	Plant Pathology/Phytopathology.
26	26.0307	Plant Physiology.
26	26.0308	Plant Molecular Biology.
26	26.0399	Botany/Plant Biology, Other.
26	26.0400	Cell/Cellular Biology and Anatomical Sciences.
26	26.0401	Cell/Cellular Biology and Histology.
26	26.0403	Anatomy.
26	26.0404	Developmental Biology and Embryology.
26	26.0406	Cell/Cellular and Molecular Biology.
26	26.0407	Cell Biology and Anatomy.
26	26.0499	Cell/Cellular Biology and Anatomical Sciences, Other.
26	26.0500	Microbiological Sciences and Immunology.
26	26.0502	Microbiology, General.
26	26.0503	Medical Microbiology and Bacteriology.
26	26.0504	Virology.
26	26.0505	Parasitology.
26	26.0506	Mycology.
26	26.0507	Immunology.
26	26.0508	Microbiology and Immunology.
26	26.0509	Infectious Disease and Global Health.
26	26.0599	Microbiological Sciences and Immunology, Other.
26	26.0700	Zoology/Animal Biology.
26	26.0701	Zoology/Animal Biology.
26	26.0702	Entomology.
26	26.0707	Animal Physiology.
26	26.0708	Animal Behavior and Ethology.
26	26.0709	Wildlife Biology.
26	26.0799	Zoology/Animal Biology, Other.
26	26.0800	Genetics.
26	26.0801	Genetics, General.
26	26.0802	Molecular Genetics.



CIP Code Two-Digit Series	2020 CIP Code	CIP Code Title
26	26.0803	Microbial and Eukaryotic Genetics.
26	26.0804	Animal Genetics.
26	26.0805	Plant Genetics.
26	26.0806	Human/Medical Genetics.
26	26.0807	Genome Sciences/Genomics.
26	26.0899	Genetics, Other.
26	26.0900	Physiology, Pathology and Related Sciences.
26	26.0901	Physiology, General.
26	26.0902	Molecular Physiology.
26	26.0903	Cell Physiology.
26	26.0904	Endocrinology.
26	26.0905	Reproductive Biology.
26	26.0907	Cardiovascular Science.
26	26.0908	Exercise Physiology and Kinesiology.
26	26.0909	Vision Science/Physiological Optics.
26	26.0910	Pathology/Experimental Pathology.
26	26.0911	Oncology and Cancer Biology.
26	26.0912	Aerospace Physiology and Medicine.
26	26.0913	Biomechanics.
26	26.0999	Physiology, Pathology, and Related Sciences, Other.
26	26.1000	Pharmacology and Toxicology.
26	26.1001	Pharmacology.
26	26.1002	Molecular Pharmacology.
26	26.1003	Neuropharmacology.
26	26.1004	Toxicology.
26	26.1005	Molecular Toxicology.
26	26.1006	Environmental Toxicology.
26	26.1007	Pharmacology and Toxicology.
26	26.1099	Pharmacology and Toxicology, Other.
26	26.1100	Biomathematics, Bioinformatics, and Computational Biology.
26	26.1101	Biometry/Biometrics.
26	26.1102	Biostatistics.
26	26.1103	Bioinformatics.
26	26.1104	Computational Biology.
26	26.1199	Biomathematics, Bioinformatics, and Computational Biology, Other.
26	26.1200	Biotechnology.



CIP Code Two-Digit Series	2020 CIP Code	CIP Code Title
26	26.1201	Biotechnology.
26	26.1300	Ecology, Evolution, Systematics, and Population Biology.
26	26.1301	Ecology.
26	26.1302	Marine Biology and Biological Oceanography.
26	26.1303	Evolutionary Biology.
26	26.1304	Aquatic Biology/Limnology.
26	26.1305	Environmental Biology.
26	26.1306	Population Biology.
26	26.1307	Conservation Biology.
26	26.1308	Systematic Biology/Biological Systematics.
26	26.1309	Epidemiology.
26	26.1310	Ecology and Evolutionary Biology.
26	26.1311	Epidemiology and Biostatistics.
26	26.1399	Ecology, Evolution, Systematics and Population Biology, Other.
26	26.1400	Molecular Medicine.
26	26.1401	Molecular Medicine.
26	26.1500	Neurobiology and Neurosciences.
26	26.1501	Neuroscience.
26	26.1502	Neuroanatomy.
26	26.1503	Neurobiology and Anatomy.
26	26.1504	Neurobiology and Behavior.
26	26.1599	Neurobiology and Neurosciences, Other.
26	26.9900	Biological and Biomedical Sciences, Other.
26	26.9999	Biological and Biomedical Sciences, Other.
27	27.0000	MATHEMATICS AND STATISTICS.
27	27.0100	Mathematics.
27	27.0101	Mathematics, General.
27	27.0102	Algebra and Number Theory.
27	27.0103	Analysis and Functional Analysis.
27	27.0104	Geometry/Geometric Analysis.
27	27.0105	Topology and Foundations.
27	27.0199	Mathematics, Other.
27	27.0300	Applied Mathematics.
27	27.0301	Applied Mathematics, General.
27	27.0303	Computational Mathematics.
27	27.0304	Computational and Applied Mathematics.



CIP Code Two-Digit Series	2020 CIP Code	CIP Code Title
27	27.0305	Financial Mathematics.
27	27.0306	Mathematical Biology.
27	27.0399	Applied Mathematics, Other.
27	27.0500	Statistics.
27	27.0501	Statistics, General.
27	27.0502	Mathematical Statistics and Probability.
27	27.0503	Mathematics and Statistics.
27	27.0599	Statistics, Other.
27	27.0600	Applied Statistics.
27	27.0601	Applied Statistics, General.
27	27.9900	Mathematics and Statistics, Other.
27	27.9999	Mathematics and Statistics, Other.
28	28.0501	Air Science/Airpower Studies.
28	28.0502	Air and Space Operational Art and Science.
28	28.0505	Naval Science and Operational Studies.
29	29.0201	Intelligence, General.
29	29.0202	Strategic Intelligence.
29	29.0203	Signal/Geospatial Intelligence.
29	29.0204	Command & Control (C3, C4I) Systems and Operations.
29	29.0205	Information Operations/Joint Information Operations.
29	29.0206	Information/Psychological Warfare and Military Media Relations.
29	29.0207	Cyber/Electronic Operations and Warfare.
29	29.0299	Intelligence, Command Control and Information Operations, Other.
29	29.0301	Combat Systems Engineering.
29	29.0302	Directed Energy Systems.
29	29.0303	Engineering Acoustics.
29	29.0304	Low-Observables and Stealth Technology.
29	29.0305	Space Systems Operations.
29	29.0306	Operational Oceanography.
29	29.0307	Undersea Warfare.
29	29.0399	Military Applied Sciences, Other.
29	29.0401	Aerospace Ground Equipment Technology.
29	29.0402	Air and Space Operations Technology.
29	29.0403	Aircraft Armament Systems Technology.
29	29.0404	Explosive Ordinance/Bomb Disposal.
29	29.0405	Joint Command/Task Force (C3, C4I) Systems.



CIP Code Two-Digit Series	2020 CIP Code	CIP Code Title
29	29.0406	Military Information Systems Technology.
29	29.0407	Missile and Space Systems Technology.
29	29.0408	Munitions Systems/Ordinance Technology.
29	29.0409	Radar Communications and Systems Technology.
29	29.0499	Military Systems and Maintenance Technology, Other.
29	29.9999	Military Technologies and Applied Sciences, Other.
30	30.0101	Biological and Physical Sciences.
30	30.0601	Systems Science and Theory.
30	30.0801	Mathematics and Computer Science.
30	30.1001	Biopsychology.
30	30.1701	Behavioral Sciences.
30	30.1801	Natural Sciences.
30	30.1901	Nutrition Sciences.
30	30.2501	Cognitive Science, General.
30	30.2701	Human Biology.
30	30.3001	Computational Science.
30	30.3101	Human Computer Interaction.
30	30.3201	Marine Sciences.
30	30.3301	Sustainability Studies.
30	30.3401	Anthrozoology.
30	30.3501	Climate Science.
30	30.3801	Earth Systems Science.
30	30.3901	Economics and Computer Science.
30	30.4101	Environmental Geosciences.
30	30.4301	Geobiology.
30	30.4401	Geography and Environmental Studies.
30	30.4801	Linguistics and Computer Science
30	30.4901	Mathematical Economics.
30	30.5001	Mathematics and Atmospheric/Oceanic Science.
30	30.7001	Data Science, General.
30	30.7101	Data Analytics, General.
30	30.7102	Business Analytics.
30	30.7103	Data Visualization.
30	30.7104	Financial Analytics.
30	30.7199	Data Analytics, Other.
40	40.0000	PHYSICAL SCIENCES.
40	40.0100	Physical Sciences, General.



CIP Code Two-Digit Series	2020 CIP Code	CIP Code Title
40	40.0101	Physical Sciences, General.
40	40.0200	Astronomy and Astrophysics.
40	40.0201	Astronomy.
40	40.0202	Astrophysics.
40	40.0203	Planetary Astronomy and Science.
40	40.0299	Astronomy and Astrophysics, Other.
40	40.0400	Atmospheric Sciences and Meteorology.
40	40.0401	Atmospheric Sciences and Meteorology, General.
40	40.0402	Atmospheric Chemistry and Climatology.
40	40.0403	Atmospheric Physics and Dynamics.
40	40.0404	Meteorology.
40	40.0499	Atmospheric Sciences and Meteorology, Other.
40	40.0500	Chemistry.
40	40.0501	Chemistry, General.
40	40.0502	Analytical Chemistry.
40	40.0503	Inorganic Chemistry.
40	40.0504	Organic Chemistry.
40	40.0506	Physical Chemistry.
40	40.0507	Polymer Chemistry.
40	40.0508	Chemical Physics.
40	40.0509	Environmental Chemistry.
40	40.0510	Forensic Chemistry.
40	40.0511	Theoretical Chemistry.
40	40.0512	Cheminformatics/Chemistry Informatics.
40	40.0599	Chemistry, Other.
40	40.0600	Geological and Earth Sciences/Geosciences.
40	40.0601	Geology/Earth Science, General.
40	40.0602	Geochemistry.
40	40.0603	Geophysics and Seismology.
40	40.0604	Paleontology.
40	40.0605	Hydrology and Water Resources Science.
40	40.0606	Geochemistry and Petrology.
40	40.0607	Oceanography, Chemical and Physical.
40	40.0699	Geological and Earth Sciences/Geosciences, Other.
40	40.0800	Physics.
40	40.0801	Physics, General.



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40	40.0802	Atomic/Molecular Physics.
40	40.0804	Elementary Particle Physics.
40	40.0805	Plasma and High-Temperature Physics.
40	40.0806	Nuclear Physics.
40	40.0807	Optics/Optical Sciences.
40	40.0808	Condensed Matter and Materials Physics.
40	40.0809	Acoustics.
40	40.0810	Theoretical and Mathematical Physics.
40	40.0899	Physics, Other.
40	40.1000	Materials Sciences.
40	40.1001	Materials Science.
40	40.1002	Materials Chemistry.
40	40.1099	Materials Sciences, Other.
40	40.1100	Physics and Astronomy.
40	40.1101	Physics and Astronomy.
40	40.9900	Physical Sciences, Other.
40	40.9999	Physical Sciences, Other.
41	41.0000	Science Technologies/Technicians, General.
41	41.0101	Biology/Biotechnology Technology/Technician.
41	41.0204	Industrial Radiologic Technology/Technician.
41	41.0205	Nuclear/Nuclear Power Technology/Technician.
41	41.0299	Nuclear and Industrial Radiologic Technologies/Technicians, Other.
41	41.0301	Chemical Technology/Technician.
41	41.0303	Chemical Process Technology.
41	41.0399	Physical Science Technologies/Technicians, Other.
41	41.9999	Science Technologies/Technicians, Other.
42	42.2701	Cognitive Psychology and Psycholinguistics.
42	42.2702	Comparative Psychology.
42	42.2703	Developmental and Child Psychology.
42	42.2704	Experimental Psychology.
42	42.2705	Personality Psychology.
42	42.2706	Behavioral Neuroscience.
42	42.2707	Social Psychology.
42	42.2708	Psychometrics and Quantitative Psychology.
42	42.2709	Psychopharmacology.
42	42.2710	Developmental and Adolescent Psychology.
42	42.2799	Research and Experimental Psychology, Other.



CIP Code Two-Digit Series	2020 CIP Code	CIP Code Title
42	42.2804	Industrial and Organizational Psychology.
43	43.0403	Cyber/Computer Forensics and Counterterrorism.
43	43.0406	Forensic Science and Technology.
43	43.0407	Geospatial Intelligence.
45	45.0102	Social Sciences, Research Methodology and Quantitative Methods.
45	45.0301	Archeology.
45	45.0501	Demography and Population Studies.
45	45.0603	Econometrics and Quantitative Economics.
45	45.0702	Geographic Information Science and Cartography.
49	49.0101	Aeronautics/Aviation/Aerospace Science and Technology, General.
51	51.1002	Cytotechnology/Cytotechnologist.
51	51.1005	Clinical Laboratory Science/Medical Technology/Technologist.
51	51.1401	Medical Science/Scientist.
51	51.2003	Pharmaceutics and Drug Design.
51	51.2004	Medicinal and Pharmaceutical Chemistry.
51	51.2005	Natural Products Chemistry and Pharmacognosy.
51	51.2006	Clinical and Industrial Drug Development.
51	51.2007	Pharmacoeconomics/Pharmaceutical Economics.
51	51.2009	Industrial and Physical Pharmacy and Cosmetic Sciences.
51	51.2010	Pharmaceutical Sciences.
51	51.2202	Environmental Health.
51	51.2205	Health/Medical Physics.
51	51.2706	Medical Informatics.
52	52.1301	Management Science.
52	52.1302	Business Statistics.
52	52.1304	Actuarial Science.
52	52.1399	Management Sciences and Quantitative Methods, Other.



RELEASES

White House Unveils America's AI Action Plan

The White House

July 23, 2025

The White House today released “[Winning the AI Race: America's AI Action Plan](#)”, in accordance with President Trump's January executive order on [Removing Barriers to American Leadership in AI](#). Winning the AI race will usher in a new golden age of human flourishing, economic competitiveness, and national security for the American people.

The Plan identifies over 90 Federal policy actions across three pillars – Accelerating Innovation, Building American AI Infrastructure, and Leading in International Diplomacy and Security – that the Trump Administration will take in the coming weeks and months.

Key policies in the AI Action Plan include:

- **Exporting American AI:** The Commerce and State Departments will partner with industry to deliver secure, full-stack AI export packages – including hardware, models, software, applications, and standards – to America's friends and allies around the world.
- **Promoting Rapid Buildout of Data Centers:** Expediting and modernizing permits for data centers and semiconductor fabs, as well as creating new national initiatives to increase high-demand occupations like electricians and HVAC technicians.
- **Enabling Innovation and Adoption:** Removing onerous Federal regulations that hinder AI development and deployment, and seek private sector input on rules to remove.
- **Upholding Free Speech in Frontier Models:** Updating Federal procurement guidelines to ensure that the government only contracts with frontier large language model developers who ensure that their systems are objective and free from top-down ideological bias.

“America's AI Action Plan charts a decisive course to cement U.S. dominance in artificial intelligence. President Trump has prioritized AI as a cornerstone of American innovation, powering a new age of American leadership in science, technology, and global influence. This plan galvanizes Federal efforts to turbocharge our innovation capacity, build cutting-edge infrastructure, and lead globally, ensuring that American workers and families thrive in the AI era. We are moving with urgency to make this vision a reality,” **said White House Office of Science and Technology Policy Director Michael Kratsios.**

“Artificial intelligence is a revolutionary technology with the potential to transform the global economy and alter the balance of power in the world. To remain the leading economic and military power, the United States must win the AI race. Recognizing this, President Trump directed us to produce this Action Plan. To win the AI race, the U.S. must lead in innovation, infrastructure, and global partnerships. At the same time, we must center American workers and avoid Orwellian uses of AI. This Action Plan provides a roadmap for doing that,” **said AI and Crypto Czar David Sacks.**

“Winning the AI Race is non-negotiable. America must continue to be the dominant force in artificial intelligence to promote prosperity and protect our economic and national security. President Trump recognized this at the beginning of his administration and took decisive action by commissioning this AI Action Plan. These clear-cut policy goals set expectations for the Federal Government to ensure America sets the technological gold standard worldwide, and that the world continues to run on American technology,” **said Secretary of State and Acting National Security Advisor Marco Rubio.**

Learn more at [AI.Gov](#).

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Wide Acclaim for President Trump's Visionary AI Action Plan

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1 2 3 ... 99 NEXT PAGE



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PRESIDENTIAL ACTIONS

REMOVING BARRIERS TO AMERICAN LEADERSHIP IN ARTIFICIAL INTELLIGENCE

The White House

January 23, 2025

By the authority vested in me as President by the Constitution and the laws of the United States of America, it is hereby ordered as follows:

Section 1. Purpose. The United States has long been at the forefront of artificial intelligence (AI) innovation, driven by the strength of our free markets, world-class research institutions, and entrepreneurial spirit. To maintain this leadership, we must develop AI systems that are free from ideological bias or engineered social agendas. With the right Government policies, we can solidify our position as the global leader in AI and secure a brighter future for all Americans. This order revokes certain existing AI policies and directives that act as barriers to American AI innovation, clearing a path for the United States to act decisively to retain global leadership in artificial intelligence.

Sec. 2. Policy. It is the policy of the United States to sustain and enhance America's global AI dominance in order to promote human flourishing, economic competitiveness, and national security.

Sec. 3. Definition. For the purposes of this order, "artificial intelligence" or "AI" has the meaning set forth in 15 U.S.C. 9401(3).

Sec. 4. Developing an Artificial Intelligence Action Plan. (a) Within 180 days of this order, the Assistant to the President for Science and Technology (APST), the Special Advisor for AI and Crypto, and the Assistant to the President for National Security Affairs (APNSA), in coordination

with the Assistant to the President for Economic Policy, the Assistant to the President for Domestic Policy, the Director of the Office of Management and Budget (OMB Director), and the heads of such executive departments and agencies (agencies) as the APST and APNSA deem relevant, shall develop and submit to the President an action plan to achieve the policy set forth in section 2 of this order.

Sec. 5. Implementation of Order Revocation. (a) The APST, the Special Advisor for AI and Crypto, and the APNSA shall immediately review, in coordination with the heads of all agencies as they deem relevant, all policies, directives, regulations, orders, and other actions taken pursuant to the revoked Executive Order 14110 of October 30, 2023 (Safe, Secure, and Trustworthy Development and Use of Artificial Intelligence). The APST, the Special Advisor for AI and Crypto, and the APNSA shall, in coordination with the heads of relevant agencies, identify any actions taken pursuant to Executive Order 14110 that are or may be inconsistent with, or present obstacles to, the policy set forth in section 2 of this order. For any such agency actions identified, the heads of agencies shall, as appropriate and consistent with applicable law, suspend, revise, or rescind such actions, or propose suspending, revising, or rescinding such actions. If in any case such suspension, revision, or rescission cannot be finalized immediately, the APST and the heads of agencies shall promptly take steps to provide all available exemptions authorized by any such orders, rules, regulations, guidelines, or policies, as appropriate and consistent with applicable law, until such action can be finalized.

(b) Within 60 days of this order, the OMB Director, in coordination with the APST, shall revise OMB Memoranda M-24-10 and M-24-18 as necessary to make them consistent with the policy set forth in section 2 of this order.

Sec. 6. General Provisions. (a) Nothing in this order shall be construed to impair or otherwise affect:

- (i) the authority granted by law to an executive department or agency, or the head thereof; or
- (ii) the functions of the Director of the Office of Management and Budget relating to budgetary, administrative, or legislative proposals.

(b) This order shall be implemented consistent with applicable law and subject to the availability of appropriations.

(c) This order is not intended to, and does not, create any right or benefit, substantive or procedural, enforceable at law or in equity by any party against the United States, its departments, agencies, or entities, its officers, employees, or agents, or any other person.

THE WHITE HOUSE,

January 23, 2025.

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1 2 3 ... 80 NEXT PAGE



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PRESIDENTIAL ACTIONS

UNLOCKING CURES FOR PEDIATRIC CANCER WITH ARTIFICIAL INTELLIGENCE

Executive Orders

September 30, 2025

By the authority vested in me as President by the Constitution and the laws of the United States of America, it is hereby ordered:

Section 1. Purpose and Policy. My Administration is committed to driving innovation to prevent and treat childhood diseases, including through the use of artificial intelligence (AI). Pediatric cancer remains the leading cause of disease-related death for children in the United States aged 1-19 years, and its incidence has increased by more than 40 percent since 1975.

As outlined in my joint address to the Congress in March, reversing this trend is one of the top priorities for the Make America Healthy Again (MAHA) Commission established in Executive Order 14212 of February 13, 2025 (Establishing the President's Make America Healthy Again Commission). AI presents an opportunity to more quickly achieve this aim.

In 2019, my Administration created the Childhood Cancer Data Initiative (CCDI), a Federal investment in childhood cancer research of \$50 million in funding every year for 10 years to address the critical need to collect, generate, and analyze childhood cancer data. The CCDI is building a foundational data infrastructure, aggregating and generating new data, and using this data to make new discoveries.

AI can be used to build upon this data initiative to produce meaningful solutions to pediatric, adolescent, and young adulthood cancer. This application of AI has the potential to transform the Nation's current care and research approach for pediatric cancer -- as well as our healthcare and research infrastructure more broadly -- through use of the rich and multimodal data, secured with appropriate individual privacy protections, to develop early and superior diagnostics, identify cures and optimize treatments, and advance medicine that will save lives.

For too long, we have watched our children and their families battle cancer and its long-term chronic effects while healthcare systems often rely on outdated technologies and can be slow to adopt certain innovations. We must prioritize investment in AI-enabled science, build world-class scientific datasets, and empower researchers and clinicians with the tools needed to translate data and AI capabilities into improved care.

Sec. 2. Harnessing American AI Innovation. The MAHA Commission, in coordination with the Secretary of Health and Human Services (Secretary), the Assistant to the President for Science and Technology (APST), and the Special Advisor for AI and Crypto, and in alignment with the implementation of America's AI Action Plan, shall work to develop innovative ways to utilize advanced technologies such as AI to unlock improved diagnoses, treatments, cures, and prevention strategies for pediatric cancer. The initial focus shall be on identifying opportunities to accelerate the progress of AI-driven solutions at the CCDI, including by making data platforms and tools available as part of the CCDI Data Ecosystem and funding research projects at National Cancer Institute–Designated Cancer Centers that prioritize:

- (a) improving data infrastructure by consolidating data from multiple sources for AI-ready analysis and utilizing AI to better select participants for clinical trials;
- (b) enhancing data analysis of complex biologic systems with AI tools to radically improve predictive modeling of patient response, disease progression, and treatment toxicity and to turn multi-omics data and imaging data into novel diagnostic, prognostic, and therapeutic biomarkers; and
- (c) improving clinical trial design, access, and outcomes for patients by incorporating multimodal data and using AI approaches to maximize utilization of the information from clinical trials and improve accessibility, recruitment, administration, conduct, and interpretation of clinical trial results.

Sec. 3. Increasing Investment and Engagement in Pediatric Cancer Research and Care Infrastructure. The MAHA Commission, in coordination with the Secretary, the Director of the Office of Management and Budget, the Director of the National Institutes of Health, and the APST, shall prioritize expanding pediatric cancer research and advancements in care by identifying and implementing strategies for:

- (a) increasing investment from existing Federal funds for the CCDI and other Federal Government initiatives that address pediatric cancer; and
- (b) encouraging the private sector to make use of the most advanced technologies to unlock cures for pediatric cancer, including those based on AI, to the maximum possible extent.

Sec. 4. Improving Data Sharing and Empowering Patients. The Secretary, in consultation with the APST, shall work to ensure that AI innovation is appropriately integrated into current work on interoperability to maximize the potential for electronic health record and claims data to inform private sector and academic research and clinical trial design, while ensuring that patients and parents control their health information. In addition, the Secretary shall work to finalize interoperability standards for patient data to be used with AI that appropriately account for structured and unstructured data and enable safe and privacy-compliant exchanges of data.

Sec. 5. Definition. For the purposes of this order, “artificial intelligence” or “AI” has the meaning set forth in 15 U.S.C. 9401(3).

Sec. 6. General Provisions. (a) Nothing in this order shall be construed to impair or otherwise affect:

- (i) the authority granted by law to an executive department or agency, or the head thereof; or
 - (ii) the functions of the Director of the Office of Management and Budget relating to budgetary, administrative, or legislative proposals.
- (b) This order shall be implemented consistent with applicable law and subject to the availability of appropriations.
- (c) This order is not intended to, and does not, create any right or benefit, substantive or procedural, enforceable at law or in equity by any party against the United States, its departments, agencies, or entities, its officers, employees, or agents, or any other person.
- (d) The costs for publication of this order shall be borne by the Department of Health and Human Services.

DONALD J. TRUMP

THE WHITE HOUSE,

September 30, 2025.

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FACT SHEETS

Fact Sheet: President Donald J. Trump Announces Actions to Make Healthcare Prices Transparent

The White House

February 25, 2025

EMPOWERING PATIENTS THROUGH RADICAL PRICE TRANSPARENCY: Today, President Donald J. Trump signed an Executive Order to empower patients with clear, accurate, and actionable healthcare pricing information.

- The order directs the Departments of the Treasury, Labor, and Health and Human Services to rapidly implement and enforce the Trump healthcare price transparency regulations, which were slow walked by the prior administration.
 - The departments will ensure hospitals and insurers disclose actual prices, not estimates, and take action to make prices comparable across hospitals and insurers, including prescription drug prices.



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patients. Price transparency will lower healthcare prices and help patients and employers get the best deal on healthcare.

- Prices vary widely from hospital to hospital in the same region. One patient in Wisconsin saved \$1,095 by shopping for two tests between two hospitals located within 30 minutes of one another.
- One economic analysis found that President Trump's original price transparency rules, if fully implemented, could deliver savings of \$80 billion for consumers, employers, and insurers by 2025.
- Employers can lower their healthcare costs by an average of 27% on 500 common services by better shopping for care.
- The Biden Administration was sued in 2023 for not enforcing the prescription drug transparency requirements. The Trump Administration will work to hold health plans accountable for making drug prices transparent.

DELIVERING ON PROMISES TO PUT AMERICAN PATIENTS FIRST: President Trump is delivering on his promise to once again put American patients first by holding the healthcare industrial complex accountable for delivering transparent prices.

- In his first Administration, President Trump took historic action by mandating that hospitals and insurers make prices public.
- While the prior Administration failed to prioritize further implementation and enforcement of these requirements, President Trump is delivering on his promises to make the healthcare system more affordable and easier to navigate for patients.
- American patients are fed up with the status quo – 95% deem healthcare price transparency an important priority, with six in ten saying it should be a top priority of the government.
- President Trump has long pushed for radical price transparency to ensure the healthcare system puts American patients first:
 - President Trump: “Our goal was to give patients the knowledge they need about the real price of healthcare services. They’ll be able to check them, compare them, go to different locations, so they can shop for the highest-quality care at the lowest cost. And this is about high-quality care. You’re also looking at that. You’re looking at comparisons between talents, which is very important. And then, you’re also looking at cost. And, in some cases, you get the best doctor for the lowest cost. That’s a good thing.”

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PRESIDENTIAL ACTIONS

Making America Healthy Again by Empowering Patients with
Clear, Accurate, and Actionable Healthcare Pricing Information

The White House

February 25, 2025

By the authority vested in me as President by the Constitution and the laws of the United States of America, it is hereby ordered:

Section 1. Purpose. During my first term, my Administration took historic steps to correct a fundamental wrong within the American healthcare system. For far too long, prices were hidden from patients and employers, with inadequate recourse available to individuals looking to shop for care or obtain pricing information from a healthcare provider in advance of a visit or procedure. These opaque pricing arrangements allowed powerful entities, such as hospitals and insurance companies, to operate with insufficient accountability regarding their pricing practices, resulting in patients, employers, and taxpayers shouldering the burden of inflated healthcare costs.

Pursuant to Executive Order 13877 of June 24, 2019 (Improving Price and Quality Transparency in American Healthcare to Put Patients First), my Administration issued paradigm-shifting regulations to put patients first by requiring hospitals and health plans to deliver meaningful price information to the American people. These regulations require hospitals to maintain a consumer-friendly display of pricing information for up to 300 shoppable services and a machine-readable file with negotiated rates for every single service the hospital provides; health plans to post their negotiated rates with providers as well as their out-of-network payments to providers and the actual prices they or their pharmacy benefit manager pay for prescription drugs; and health plans to maintain a consumer-facing internet tool through which

individuals can access price information.

One economic analysis from 2023 estimated the impact of these regulations, if fully implemented, could result in as much as \$80 billion in healthcare savings for consumers, employers, and insurers by 2025. Another report from 2024 suggested healthcare price transparency could help employers reduce healthcare costs by 27 percent across 500 common healthcare services. Recent data has found the top 25 percent of most expensive healthcare service prices have dropped by 6.3 percent per year following the initial implementation of price transparency during my first term.

Unfortunately, progress on price transparency at the Federal level has stalled since the end of my first term. Hospitals and health plans were not adequately held to account when their price transparency data was incomplete or not even posted at all. The Biden Administration failed to take sufficient steps to fully enforce my Administration's requirement that would end the opaque nature of drug prices by ensuring health plans publicly post the true prices they pay for prescription drugs.

The American people deserve better. Making America healthy again will require empowering individuals with the best information possible to inform their life and healthcare choices. By building on the historic efforts of my first term, my Administration will make more meaningful price information available to patients to support a more competitive, innovative, affordable, and higher quality healthcare system.

Sec. 2. Policy. It is the policy of the United States to put patients first and ensure they have the information they need to make well-informed healthcare decisions. The Federal Government will continue to promote universal access to clear and accurate healthcare prices and will take all necessary steps to improve existing price transparency requirements; increase enforcement of price transparency requirements; and identify opportunities to further empower patients with meaningful price information, potentially including through the expansion of existing price transparency requirements.

Sec. 3. Fulfilling the Promise of Radical Transparency. The Secretary of the Treasury, the Secretary of Labor, and the Secretary of Health and Human Services shall take all necessary and appropriate action to rapidly implement and enforce the healthcare price transparency regulations issued pursuant to Executive Order 13877, including, within 90 days of the date of this order, action to:

- (a) require the disclosure of the actual prices of items and services, not estimates;
- (b) issue updated guidance or proposed regulatory action ensuring pricing information is standardized and easily comparable across hospitals and health plans; and
- (c) issue guidance or proposed regulatory action updating enforcement policies designed to

ensure compliance with the transparent reporting of complete, accurate, and meaningful data.

Sec. 4. General Provisions. (a) Nothing in this order shall be construed to impair or otherwise affect:

(i) the authority granted by law to an executive department or agency, or the head thereof; or

(ii) the functions of the Director of the Office of Management and Budget relating to budgetary, administrative, or legislative proposals.

(b) This order shall be implemented consistent with applicable law and subject to the availability of appropriations.

(c) This order is not intended to, and does not, create any right or benefit, substantive or procedural, enforceable at law or in equity by any party against the United States, its departments, agencies, or entities, its officers, employees, or agents, or any other person.

Related

Fact Sheet: President Donald J. Trump Announces Actions to Make Healthcare Prices Transparent

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Fact Sheet: President Donald J. Trump Calls on Congress to Enact The Great Healthcare Plan

Fact Sheets | January 15, 2026

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Presidential Actions, Executive Orders | April 15, 2025

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OCCUPATIONAL OUTLOOK HANDBOOK

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Project Management Specialists

PRINTER-FRIENDLY

Summary

What They Do

Work Environment

How to Become One

Pay

Job Outlook

State & Area Data

Similar Occupations

More Info

Summary



The median annual wage for project management specialists was \$166,750 in May 2024.

[Job Outlook](#)

Employment of project management specialists is projected to grow 6 percent from 2024 to 2034, faster than the average for all occupations.

About 78,200 openings for project management specialists are projected each year, on average, over the decade. Many of those openings are expected to result from the need to replace workers who transfer to different occupations or exit the labor force, such as to retire.

[State & Area Data](#)

Explore resources for employment and wages by state and area for project management specialists.

[Similar Occupations](#)

Compare the job duties, education, job growth, and pay of project management specialists with similar occupations.

[More Information, Including Links to O*NET](#)

Learn more about project management specialists by visiting additional resources, including O*NET, a source on key characteristics of workers and occupations.

What Project Management Specialists Do



Once a project is underway, project management specialists direct the team in carrying out the work.

Project management specialists coordinate the budget, schedule, and other details of a project. They lead and guide the work of technical staff. Project management specialists also may serve as a point of contact for the client or customer.

Duties

Project management specialists typically do the following:

- Communicate with clients to determine project requirements and objectives
- Develop project plans to include information such as objectives, funding, schedules, and staff
- Identify, review, and select vendors or consultants to meet project needs
- Assign duties or responsibilities to project staff
- Confer with project staff to identify and resolve problems
- Monitor project costs to stay within budget
- Monitor project milestones and deliverables
- Propose, review, and approve modifications to project plans
- Produce and distribute project documents

Project management specialists may begin a project by defining its scope or goals, using input from the client. They then create a plan that itemizes the individual activities, data, and resources needed to complete the project. Project management specialists ensure that the plan estimates costs, identifies potential risks, and specifies a timeline for completion.

Once a project is underway, project management specialists direct the team in carrying out the work. They monitor progress by tracking milestones and troubleshooting problems that may arise, including adjusting the project to address changes requested by the client. Finally, they close out the project by reviewing and organizing financial statements, contracts, and other documents.

These specialists may oversee a variety of projects, such as building a new commercial center, improving business processes, or expanding sales into additional markets. In coordinating a project, they may work closely with those whose expertise is in a particular field. For example, a project management specialist may collaborate with an [emergency management director](#) in disaster relief efforts or a [construction manager](#) in building a facility.

[-< Summary](#)

[Work Environment ->](#)

Work Environment



Project management specialists may work on teams of other specialists, or they may work independently.

Project management specialists held about 1.0 million jobs in 2024. The largest employers of project management specialists were as follows:

Professional, scientific, and technical services	28%
Construction	21
Manufacturing	7
Administrative and support services	5
Finance and insurance	4

Project management specialists usually work in an office setting. Although project management specialists may collaborate on teams, some work independently. Project management specialists also may travel to their clients' places of business.

Work Schedules

Project management specialists generally work during normal business hours. However, their schedules may require flexibility, such as when working across time zones or during off-peak hours. Most work full time, and some may work more than 40 hours per week.

How to Become a Project Management Specialist



Project management specialists typically need a bachelor's degree to enter the occupation.

Project management specialists typically need a bachelor’s degree that may be in a variety of fields, including business or project management. Although not always required, certification may be beneficial.

Education

To enter the occupation, project management specialists typically need a bachelor’s [degree](#) in [business](#), project management, or a related field. Some employers prefer to hire candidates who have a degree in a technical field related to the industry in which they will work, such as [computer and information technology](#) or [engineering](#).

Licenses, Certifications, and Registrations

Although not always required, professional certification demonstrates competency to prospective clients and employers. Information on certifications is available from [CareerOneStop](#).

Other Experience

Some positions require project management specialists to have relevant work experience. Candidates may gain experience as business analysts, [information security analysts](#), [training and development specialists](#), or in other related occupations.

Employers also may prefer to hire candidates who have experience in areas such as personnel recruitment, employee relations, or compensation and benefits. Candidates sometimes get this experience by volunteering or while in college, either through courses or internships.

Advancement

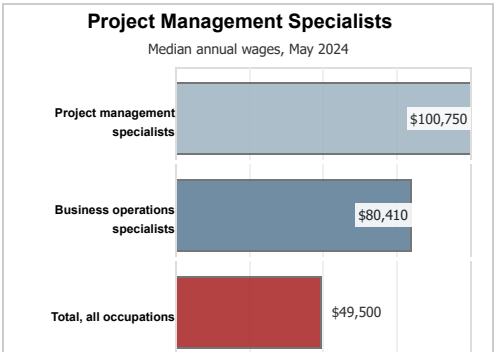
Project management specialists may advance to more senior positions as they gain experience and take on more responsibility. For example, they may begin as trainees working on small projects and progress to large, complex projects.

Important Qualities

The following are examples of qualities that are important for these workers to perform their duties. For more information, visit the Employment Projections (EP) [skills data page](#).

- Analytical skills.** Project management specialists must be able to understand large amounts of information and data.
- Communication skills.** Project management specialists need to convey information to staff and must get input from and present results to clients.
- Critical-thinking skills.** To determine which strategy would work best for a particular project, these specialists must assess its goals and impact.
- Interpersonal skills.** Project management specialists must establish trust with clients and respond well to their questions and concerns.
- Organizational skills.** Project management specialists’ work involves balancing a variety of responsibilities, and they may oversee more than one project at one time.
- Problem-solving skills.** Project management specialists must be able to handle difficult or unexpected situations and find effective solutions.
- Time-management skills.** Project management specialists often work under tight deadlines and must use their time efficiently to complete projects on schedule.

Pay



Note: All Occupations includes all occupations in the U.S. Economy.
Source: U.S. Bureau of Labor Statistics, Occupational Employment and Wage Statistics

The median annual wage for project management specialists was \$100,750 in May 2024. The median wage is the wage at which half the workers in an occupation earned more than that amount and half earned less. The lowest 10 percent earned less than \$59,830, and the highest 10 percent earned more than \$165,790.

In May 2024, the median annual wages for project management specialists in the top industries in which they worked were as follows:

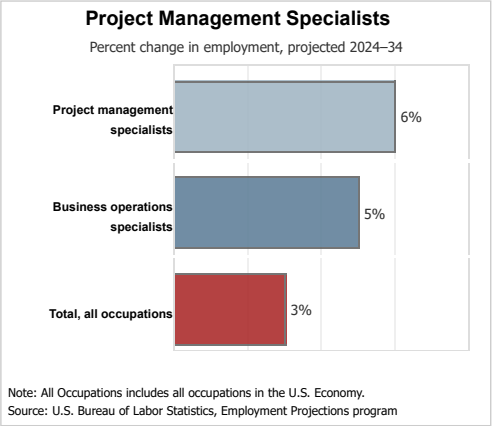
Finance and insurance	\$111,350
Professional, scientific, and technical services	106,130
Manufacturing	101,920
Administrative and support services	97,100
Construction	96,700

Most project management specialists work full time, and some work more than 40 hours per week.

<- How to Become One

Job Outlook ->

Job Outlook



Employment of project management specialists is projected to grow 6 percent from 2024 to 2034, faster than the average for all occupations.

About 78,200 openings for project management specialists are projected each year, on average, over the decade. Many of those openings are expected to result from the need to replace workers who transfer to different occupations or exit the labor force, such as to retire.

Employment

As organizations seek ways to maintain and improve productivity, employment of project management specialists is expected to increase. These specialists will be needed to help manage various business operations, ensuring that projects meet their goals and are completed on time and within budget. In addition, demand for project management specialists will likely stem from the need to manage the growing volume and complexity of information technology (IT) projects.

Employment projections data for project management specialists, 2024–34

Project management specialists
SOC Code: 13-1082
Employment, 2024: 1,046,300
Projected Employment, 2034: 1,105,000
Change, 2024–34 (Percent): 6
Change, 2024–34 (Numeric): 58,700
Employment By Industry: Get data

SOURCE: U.S. Bureau of Labor Statistics, Employment Projections program

<- Pay

State & Area Data ->

State & Area Data

Occupational Employment and Wage Statistics (OEWS)

The [Occupational Employment and Wage Statistics](#) (OEWS) program produces employment and wage estimates annually for over 800 occupations. These estimates are available for the nation as a whole, for individual states, and for metropolitan and nonmetropolitan areas. The link below goes to OEWS data maps for employment and wages by state and area. Use the dropdown boxes to select an occupation.

[Occupational Employment and Wage Statistics \(OEWS\) Profiles](#)

Projections Central

Occupational employment projections are developed for all states by Labor Market Information (LMI) or individual state Employment Projections offices. All state projections data are available at www.projectionscentral.org. Information on this site allows projected employment growth for an occupation to be compared among states or to be compared within one state. In addition, states may produce projections for areas; there are links to each state’s websites where these data may be retrieved.

CareerOneStop

CareerOneStop includes hundreds of [occupational profiles](#) with data available by state and metro area. There are links in the left-hand side menu to compare occupational employment by state and occupational wages by local area or metro area. There is also a [salary info tool](#) to search for wages by zip code.

<- Job Outlook

Similar Occupations ->

Similar Occupations

This table shows a list of occupations with job duties that are similar to those of project management specialists.

Cost Estimators Job Duties: Cost estimators collect and analyze data in order to assess the time, money, materials, and labor required to make a product or provide a service. Entry-Level Education: Bachelor's degree 2024 Median Pay: \$77,070
Logisticians Job Duties: Logisticians analyze and coordinate an organization’s supply chain. Entry-Level Education: Bachelor's degree 2024 Median Pay: \$80,880
Management Analysts Job Duties: Management analysts recommend ways to improve an organization’s efficiency. Entry-Level Education: Bachelor's degree 2024 Median Pay: \$101,190
Market Research Analysts Job Duties: Market research analysts study consumer preferences, business conditions, and other factors to assess potential sales of a product or service. Entry-Level Education: Bachelor's degree 2024 Median Pay: \$76,950
Mathematicians and Statisticians Job Duties: Mathematicians and statisticians analyze data and apply computational techniques to solve problems. Entry-Level Education: Master's degree 2024 Median Pay: \$104,350
Operations Research Analysts Job Duties: Operations research analysts use mathematics and logic to help solve complex issues. Entry-Level Education: Bachelor's degree 2024 Median Pay: \$91,290
Survey Researchers Job Duties: Survey researchers design and conduct surveys and analyze data. Entry-Level Education: Master's degree 2024 Median Pay: \$63,380

<- State & Area Data

More Info ->

Contacts for More Information

For information about certifications, visit [CareerOneStop](#).

O*NET

[Project Management Specialists](#) 

[<- Similar Occupations](#)

SUGGESTED CITATION:

Bureau of Labor Statistics, U.S. Department of Labor, *Occupational Outlook Handbook*, Project Management Specialists, at <https://www.bls.gov/ooh/business-and-financial/project-management-specialists.htm> (visited April 22, 2026).

Last Modified Date: Thursday, August 28, 2025

U.S. BUREAU OF LABOR STATISTICS Occupational Outlook Handbook Office of Employment and Unemployment Statistics Suitland Federal Center Floor 3 4600 Silver Hill Road Washington, DC 20212-0002

Telephone: 202-691-5700_ www.bls.gov/ooh [Contact OOH](#)



O*NET OnLine

Project Management Specialists 13-1082.00

Bright Outlook

Updated 2026

A subset of this occupation's profile is available. Data collection is currently underway to populate other parts of the profile.

Analyze and coordinate the schedule, timeline, procurement, staffing, and budget of a product or service on a per project basis. Lead and guide the work of technical staff. May serve as a point of contact for the client or customer.

Summary

Details

Custom

Easy Read

Veterans

Español

Occupation-Specific Information

Tasks

5 of 20 displayed

- + Assign duties or responsibilities to project personnel.
- + Communicate with key stakeholders to determine project requirements and objectives.
- + Confer with project personnel to identify and resolve problems.
- + Create project status presentations for delivery to customers or project personnel.
- + Develop or update project plans including information such as objectives, technologies, schedules, funding, and staffing.

Technology Skills

5 of 35 displayed

- + **Enterprise resource planning ERP software** — Management information systems MIS; Microsoft Dynamics; Oracle PeopleSoft 🔥 ; SAP software 🔥
- + **Project management software** — Atlassian Confluence 🔥 ; Google Classroom; Microsoft Teams 🔥 ; Oracle Primavera Enterprise Project Portfolio Management 🔥
- + **Video conferencing software** — Cisco Webex 🔥 ; Google Meet; LogMeIn GoToMeeting; Zoom 🔥
- + **Video creation and editing software** — Flipgrid; Loom; Screencastify; YouTube

 **Word processing software** — 3M Post-it App; Google Docs  ; Microsoft OneNote; Microsoft Word 

 Hot Technologies are requirements most frequently included across all employer job postings.
[See all 43 Hot Technologies for this occupation.](#)

 In Demand skills are frequently included in employer job postings for this occupation.
[See all 7 In Demand skills for this occupation.](#)

Occupational Requirements

Detailed Work Activities

▼ 5 of 19 displayed

-  Develop detailed project plans.
-  Manage information technology projects or system activities.
-  Participate in staffing decisions.
-  Assign duties or work schedules to employees.
-  Collaborate with others to resolve information technology issues.

Experience Requirements

Job Zone

Title	Job Zone Four: Considerable Preparation Needed
Education	Most of these occupations require a four-year bachelor's degree, but some do not.
Related Experience	A considerable amount of work-related skill, knowledge, or experience is needed for these occupations. For example, an accountant must complete four years of college and work for several years in accounting to be considered qualified.
Job Training	Employees in these occupations usually need several years of work-related experience, on-the-job training, and/or vocational training.
Job Zone Examples	Many of these occupations involve coordinating, supervising, managing, or training others. Examples include real estate brokers, sales managers, database administrators, graphic designers, conservation scientists, art directors, and cost estimators.
SVP Range	(7.0 to < 8.0)

Training & Credentials

State training

Select a State

Go

Local training

ZIP Code

Go

Certifications

Find certifications nationwide

State licenses

Select a State

Go

Apprenticeship Opportunities

 All 1 displayed

Example apprenticeship titles for this occupation:

- Project Manager

Specific title(s) listed above are vetted by industry and approved by the U.S. Department of Labor for use in a Registered Apprenticeship Program.

Start your career and build your skillset. Visit [Apprenticeship.gov](https://www.apprenticeship.gov) to learn about opportunities related to this occupation.

Worker Characteristics

Interests

 All 2 displayed

Interest code: **EC**

 Want to discover your interests? Take the [O*NET Interest Profiler](#).

- + Enterprising** — Work involves managing, negotiating, marketing, or selling, typically in a business setting, or leading or advising people in political and legal situations. Enterprising occupations are often associated with business initiatives, sales, marketing/advertising, finance, management/administration, professional advising, public speaking, politics, or law.
- + Conventional** — Work involves following procedures and regulations to organize information or data, typically in a business setting. Conventional occupations are often associated with office work, accounting, mathematics/statistics, information technology, finance, or human resources.

Work Styles

 5 of 10 displayed

- + Self-Confidence** — A tendency to believe in one's work-related capabilities and ability to control one's work-related outcomes.
- + Leadership Orientation** — A tendency to lead, take charge, offer opinions, and provide direction at work.

- ## Workforce Characteristics

Median wages \$48.44 hourly, \$100,750 annual
(2024)

State wages

Select a State

Go

Local wages

ZIP Code

Go

Employment (2024)

1,046,300 employees

**Projected growth
(2024-2034)**



Faster than average (5% to 6%)

**Projected job
openings
(2024-2034)**

78,200

State trends

Select a State

Go

Top industries (2024)

Professional, Scientific, and Technical Services
Construction

Job Openings on the Web

State job openings

Select a State

Go

Contents

Local job openings

ZIP Code

Go

More Information

5 of 10 displayed

- 11-3012.00 [Administrative Services Managers](#) ☀️ **Bright Outlook**
- 11-3021.00 [Computer and Information Systems Managers](#) ☀️
- 15-1299.09 [Information Technology Project Managers](#) ☀️
- 13-1081.00 [Logisticians](#) ☀️
- 13-1111.00 [Management Analysts](#) ☀️

Professional Associations

Disclaimer: Sources are listed to provide additional information on related jobs, specialties, and/or industries. Links to non-DOL Internet sites are provided for your convenience and do not constitute an endorsement.

National Associations

▼ 5 of 14 displayed

- [American Society for Engineering Management](#) ↗
- [Association for Project Management](#) ↗
- [Association for Supply Chain Management](#) ↗
- [Association of Business Process Management Professionals](#) ↗
- [Financial Management Association International](#) ↗

Accreditation, Certification, & Unions

▼ 5 of 6 displayed

- [CompTIA](#) ↗ **ALLY**
- [Project Management Institute](#) ↗ **ALLY**
- [AACSB International](#) ↗
- [American Management Association](#) ↗
- [Institute of Certified Professional Managers](#) ↗



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Feedback

7%



certification report higher median salaries than those without PMP certification—17% higher on average
ountries surveyed

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1.7M+

PMP certification holders worldwide, with top countries including China, US, and Canada.

Exam Content Outline (ECO)

Download the PMP Exam Content Outline for details about the exam, eligibility requirements, and the application process.

English

Download 

About the Exam

Exam length	Exam time
180 questions	230 minutes

Languages

English	Arabic
Brazilian Portuguese	Chinese (Simplified)
Chinese (Traditional)	French
German	Hebrew
Indonesian	Italian
Japanese	Korean
Polish	Russian
Spanish	Turkish

Feedback



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If you plan to take the exam after 9 July, prepare using the refreshed learning resources now available.

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Path to a PMP certification

1 Check eligibility and prepare

Feedback



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- 4

Study for the exam

+
- View FAQs

Take the exam

+

How to prepare for the PMP exam

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PMI members receive exclusive savings on exam prep.



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Susan Aznive
New Hampshire, USA



How the PMP certification pays off

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Earning your PMP certification is a big accomplishment—maintaining it shouldn't have to be. Continuous skill growth that extends beyond certification is critical to fueling your career and your impact. PMP holders are required to earn 60 professional development units (PDUs) in each 3-year cycle to maintain a PMP certification. Each PDU represents one hour spent:

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Project Management Professional (PMP)®
Examination Content Outline – January 2021



Project Management Institute

**Project Management Professional (PMP)[®]
Examination Content Outline**

January 2021 Exam Update

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TABLE OF CONTENTS

Introduction	1
Exam Content Outline	2
Domains, Tasks, and Enablers	3
Domain I: People	4
Domain II: Process	7
Domain III: Business Environment	10
PMP Application & Payment	11
PMP Eligibility Requirements	11
How to Record Your Experience & Education	12
PMP Certification Fees	14
PMP Examination Information	15

INTRODUCTION

The Project Management Institute (PMI) offers a professional certification for project managers, known as the Project Management Professional (PMP)[®]. PMI's examination development processes stand apart from other certification programs. PMI aligns its process with certification industry best practices, such as those found in the *Standards for Educational and Psychological Testing*. The PMP[®] certification is also accredited against the internationally recognized ISO 9001 and ISO/ANSI 17024 standards.¹

A key component of the ISO/ANSI 17024 standard is that organizations wishing to offer valid, reliable and fair credentialing examinations must use a criterion referenced approach as the basis for exam creation such as a role delineation study (RDS) or job task analysis (JTA). PMI conducted a global practice analysis (GPA), which included both extensive market research and a JTA.

The GPA produced a number of trends in the profession previously unaddressed in the PMP exam. These trends were used as inputs into the JTA and ensure the validity and relevance of the PMP examination. Validation assures that each examination measures the most critical and frequently performed elements of the project management profession in terms of real settings.

The PMP examination is a vital part of the earning this professional certification thus it is imperative that the exam accurately reflect the practices of project managers. All the questions on the examination have been written and extensively reviewed by subject matter experts who hold a valid PMP and tracked to at least two references. These questions are mapped to the *PMP Examination Content Outline* to ensure that an appropriate number of questions are in place for a valid examination.

PMI retained Alpine Testing Solutions to develop the global *PMP Examination Content Outline*. Alpine Testing Solutions provides psychometric, test development, and credential management solutions to credentialing and educational programs.

Finally, there are noticeable differences between this updated *PMP Examination Content Outline* and *A Guide to the Project Management Body of Knowledge (PMBOK[®] Guide)*. While there are some commonalities, it is important to note that the volunteer taskforce involved in the GPA study described previously were not bound by the *PMBOK[®] Guide*. The taskforce members were charged with outlining critical job tasks of individuals who lead and direct projects based on their experience and pertinent resources.

¹ Published jointly by the American Education Research Association, National Council on Measurement in Education, and American Psychological Association. The PMP certification is also accredited by the American National Standards Institute (ANSI) against the internationally recognized ISO/IEC 17024 standard: *Conformity Assessment—General Requirements for Bodies Operating Certification of Persons*.

EXAM CONTENT OUTLINE

The following table identifies the proportion of questions from each domain that will appear on the examination.

Domain	Percentage of Items on Test
I. People	42%
II. Process	50%
III. Business Environment	8%
Total	100%

Important note: The research conducted through the JTA validated that today's project management practitioners work in a variety of project environments and utilize different project approaches. Accordingly, the PMP certification will be reflective of this and will incorporate approaches across the value delivery spectrum. **About half of the examination will represent predictive project management approaches and the other half will represent agile or hybrid approaches.** Predictive, agile, and hybrid approaches will be found throughout the three domain areas listed above and are not isolated to any particular domain or task. The exact number of items for each question type and approach may vary by form. Our scoring model is periodically reviewed by scoring experts to ensure valid assessment of knowledge and skills.

DOMAINS, TASKS, AND ENABLERS

In this document you will find an updated structure for the *PMP Examination Content Outline*. Based on feedback from customers and stakeholders, we have worked on simplifying the format so that the *PMP Examination Content Outline* is easier to understand and interpret.

On the following pages you will find the domains, tasks, and enablers as defined by the JTA.

- **Domain:** Defined as the high-level knowledge area that is essential to the practice of project management.
- **Tasks:** The underlying responsibilities of the project manager within each domain area.
- **Enablers:** Illustrative examples of the work associated with the task. Please note that enablers are not meant to be an exhaustive list but rather offer a few examples to help demonstrate what the task encompasses.

Each PMP examination will include all tasks for a domain, and PMI will adhere to the percentage of coverage at the domain level as outlined on the previous page.

Following is an example of the new task structure:

Task statement → **Manage conflict**

- Enablers {
- Interpret the source and stage of the conflict
 - Analyze the context for the conflict
 - Evaluate/recommend/reconcile the appropriate conflict resolution solution

Domain I		People—42%
Task 1	Manage conflict • Interpret the source and stage of the conflict • Analyze the context for the conflict • Evaluate/recommend/reconcile the appropriate conflict resolution solution	
Task 2	Lead a team • Set a clear vision and mission • Support the team’s varied experiences and perceptions • Value servant leadership (e.g., relate the tenets of servant leadership to the team) • Determine an appropriate leadership style (e.g., directive, collaborative) • Inspire, motivate, and influence team members/stakeholders (e.g., team contract, social contract, reward system) • Analyze team members and stakeholders’ influence • Distinguish various options to lead various team members and stakeholders	
Task 3	Support team performance • Appraise team member performance against key performance indicators • Support and recognize team member growth and development • Determine appropriate feedback approach • Verify performance improvements	
Task 4	Empower team members and stakeholders • Organize around team strengths • Support team task accountability • Evaluate demonstration of task accountability • Determine and bestow level(s) of decision-making authority	
Task 5	Ensure team members/stakeholders are adequately trained • Determine required competencies and elements of training • Determine training options based on training needs • Allocate resources for training • Measure training outcomes	
Task 6	Build a team • Appraise stakeholder skills • Deduce project resource requirements • Continuously assess and refresh team skills to meet project needs • Maintain team and knowledge transfer	

Task 7	Address and remove impediments, obstacles, and blockers for the team • Determine critical impediments, obstacles, and blockers for the team • Prioritize critical impediments, obstacles, and blockers for the team • Use network to implement solutions to remove impediments, obstacles, and blockers for the team • Re-assess continually to ensure impediments, obstacles, and blockers for the team are being addressed
Task 8	Negotiate project agreements • Analyze the bounds of the negotiations for agreement • Assess priorities and determine ultimate objective(s) • Verify objective(s) of the project agreement is met • Participate in agreement negotiations • Determine a negotiation strategy
Task 9	Collaborate with stakeholders • Evaluate engagement needs for stakeholders • Optimize alignment between stakeholder needs, expectations, and project objectives • Build trust and influence stakeholders to accomplish project objectives
Task 10	Build shared understanding • Break down situation to identify the root cause of a misunderstanding • Survey all necessary parties to reach consensus • Support outcome of parties' agreement • Investigate potential misunderstandings
Task 11	Engage and support virtual teams • Examine virtual team member needs (e.g., environment, geography, culture, global, etc.) • Investigate alternatives (e.g., communication tools, colocation) for virtual team member engagement • Implement options for virtual team member engagement • Continually evaluate effectiveness of virtual team member engagement
Task 12	Define team ground rules • Communicate organizational principles with team and external stakeholders • Establish an environment that fosters adherence to the ground rules • Manage and rectify ground rule violations

Task 13	Mentor relevant stakeholders • Allocate the time to mentoring • Recognize and act on mentoring opportunities
Task 14	Promote team performance through the application of emotional intelligence • Assess behavior through the use of personality indicators • Analyze personality indicators and adjust to the emotional needs of key project stakeholders

Domain II		Process—50%
Task 1	Execute project with the urgency required to deliver business value - Assess opportunities to deliver value incrementally - Examine the business value throughout the project - Support the team to subdivide project tasks as necessary to find the minimum viable product	
Task 2	Manage communications - Analyze communication needs of all stakeholders - Determine communication methods, channels, frequency, and level of detail for all stakeholders - Communicate project information and updates effectively - Confirm communication is understood and feedback is received	
Task 3	Assess and manage risks - Determine risk management options - Iteratively assess and prioritize risks	
Task 4	Engage stakeholders - Analyze stakeholders (e.g., power interest grid, influence, impact) - Categorize stakeholders - Engage stakeholders by category - Develop, execute, and validate a strategy for stakeholder engagement	
Task 5	Plan and manage budget and resources - Estimate budgetary needs based on the scope of the project and lessons learned from past projects - Anticipate future budget challenges - Monitor budget variations and work with governance process to adjust as necessary - Plan and manage resources	

Task 6	Plan and manage schedule • Estimate project tasks (milestones, dependencies, story points) • Utilize benchmarks and historical data • Prepare schedule based on methodology • Measure ongoing progress based on methodology • Modify schedule, as needed, based on methodology • Coordinate with other projects and other operations
Task 7	Plan and manage quality of products/deliverables • Determine quality standard required for project deliverables • Recommend options for improvement based on quality gaps • Continually survey project deliverable quality
Task 8	Plan and manage scope • Determine and prioritize requirements • Break down scope (e.g., WBS, backlog) • Monitor and validate scope
Task 9	Integrate project planning activities • Consolidate the project/phase plans • Assess consolidated project plans for dependencies, gaps, and continued business value • Analyze the data collected • Collect and analyze data to make informed project decisions • Determine critical information requirements
Task 10	Manage project changes • Anticipate and embrace the need for change (e.g., follow change management practices) • Determine strategy to handle change • Execute change management strategy according to the methodology • Determine a change response to move the project forward
Task 11	Plan and manage procurement • Define resource requirements and needs • Communicate resource requirements • Manage suppliers/contracts • Plan and manage procurement strategy • Develop a delivery solution

Task 12	Manage project artifacts • Determine the requirements (what, when, where, who, etc.) for managing the project artifacts • Validate that the project information is kept up to date (i.e., version control) and accessible to all stakeholders • Continually assess the effectiveness of the management of the project artifacts
Task 13	Determine appropriate project methodology/methods and practices • Assess project needs, complexity, and magnitude • Recommend project execution strategy (e.g., contracting, finance) • Recommend a project methodology/approach (i.e., predictive, agile, hybrid) • Use iterative, incremental practices throughout the project life cycle (e.g., lessons learned, stakeholder engagement, risk)
Task 14	Establish project governance structure • Determine appropriate governance for a project (e.g., replicate organizational governance) • Define escalation paths and thresholds
Task 15	Manage project issues • Recognize when a risk becomes an issue • Attack the issue with the optimal action to achieve project success • Collaborate with relevant stakeholders on the approach to resolve the issues
Task 16	Ensure knowledge transfer for project continuity • Discuss project responsibilities within team • Outline expectations for working environment • Confirm approach for knowledge transfers
Task 17	Plan and manage project/phase closure or transitions • Determine criteria to successfully close the project or phase • Validate readiness for transition (e.g., to operations team or next phase) • Conclude activities to close out project or phase (e.g., final lessons learned, retrospective, procurement, financials, resources)

Domain III Business Environment—8%	
Task 1	Plan and manage project compliance • Confirm project compliance requirements (e.g., security, health and safety, regulatory compliance) • Classify compliance categories • Determine potential threats to compliance • Use methods to support compliance • Analyze the consequences of noncompliance • Determine necessary approach and action to address compliance needs (e.g., risk, legal) • Measure the extent to which the project is in compliance
Task 2	Evaluate and deliver project benefits and value • Investigate that benefits are identified • Document agreement on ownership for ongoing benefit realization • Verify measurement system is in place to track benefits • Evaluate delivery options to demonstrate value • Appraise stakeholders of value gain progress
Task 3	Evaluate and address external business environment changes for impact on scope • Survey changes to external business environment (e.g., regulations, technology, geopolitical, market) • Assess and prioritize impact on project scope/backlog based on changes in external business environment • Recommend options for scope/backlog changes (e.g., schedule, cost changes) • Continually review external business environment for impacts on project scope/backlog
Task 4	Support organizational change • Assess organizational culture • Evaluate impact of organizational change to project and determine required actions • Evaluate impact of the project to the organization and determine required actions

PMP Application & Payment

PMP Eligibility Requirements

To be eligible for the PMP certification, you must meet certain educational and professional experience requirements. All project management experience must have been accrued within the last eight consecutive years prior to your application submission.

Educational Background	Project Management Experience
Secondary degree (high school diploma, associate's degree or global equivalent)	Minimum five years/60 months unique non-overlapping professional project management experience
OR	
Four-year degree (bachelor's degree or global equivalent)	Minimum three years/36 months unique non-overlapping professional project management experience
OR	
Bachelor's or post-graduate degree from a GAC accredited program * (bachelor's degree or master's or global equivalent)	Minimum two years/24 months unique non-overlapping professional project management experience

Experience must include leading and directing projects. A project is a temporary endeavor undertaken to create a unique product, service or result (as defined by the *PMBOK® Guide*).

In addition to the above project management experience, applications must also have at least 35 contact hours of formal project management education unless they are an active CAPM holder. If you are an active CAPM certification holder, you do NOT need to document the 35 contact hours. Your project management education requirement is waived.

If you are a graduate of a GAC accredited degree program you will receive a 12 month credit towards the work experience requirement. Also, you can use the GAC course work to fulfill the 35 education contact hour requirement. [Learn more about the PMI Global Accreditation Center for Project Management Education Programs \(GAC\).](#)

PMP Application & Payment

How to Record Your Experience & Education on the Application

Use the experience verification section of the online application to record your experience leading and directing the project. The experience does not necessarily have to be paid work, but it does need to be in a professional setting. Activities such as school projects or planning personal events would not qualify. All project experience must be recorded individually regardless of the number of projects you include.

Number of Months of Project Management Experience

Tenure is tracked in months, not number projects; therefore, 6 months of project management experience should be noted as such regardless of how many projects you worked on during those 6 months. Using this example below, the time spent working on Project 1 from January–April would count as four months toward the eligibility requirement, while the time spent working on Project 2 during May–June would count as two months toward the eligibility requirement. However, you cannot count the time working on both projects during February–April twice. Therefore, Project 1 and Project 2 equal six months (January–June) of project management experience toward your eligibility requirement.



Contact Hours of Project Management Education

Verify at least 35 contact hours of specific instruction that addressed learning objectives in project management. Record all education hours regardless of when they were accrued. **The course work must be completed by the time you submit the application.**

NOTE: One hour of classroom instruction equals one contact hour. If you have completed a university or college course on project management that met for three hours per week for 15 weeks, you would record 45 contact hours. If only a portion of a course dealt with project management, only the hours spent on project management can be applied toward the total.

The course hours may include content on project quality, project scope, project schedule, project budget, project communications, project risk, project procurement, project cost, project resources, project stakeholder, and project integration management.

PMP Application & Payment

You can satisfy the education requirements by demonstrating the successful completion of courses, workshops and training sessions offered by one or more of the following types of education providers:

- A. PMI Authorized Training Partners (ATPs)
- B. PMI chapters *
- C. Employer/company-sponsored programs
- D. Training companies or consultants (e.g., training schools)
- E. Distance-learning companies, including an end-of-course assessment
- F. University/college academic and continuing education programs

The following education does not satisfy the education requirements:

PMI chapter meetings*

Self-directed learning (e.g., reading books, watching instructional videos that do not include an end-of-course assessment)

**If at least one hour of a chapter meeting is spent conducting a learning activity, the hour(s) spent in that activity can be counted towards the educational eligibility requirement.*

NOTE: While you may be able to record applicable classes that counted toward a degree, you cannot record the degree program in its entirety because some classes within the program may not apply to the requirement.

PMI strives to process applications in a timely manner. The processing time for applications submitted online is 5 calendar days. This processing timeline does not apply if your application has been selected for PMI's audit process (refer to the PMI Audit Process section in the handbook for more details).

PMP Application & Payment

PMP Certification Fees

The fees for obtaining the PMP Certification are subject to regional and membership pricing rules. Membership is NOT required to obtain the PMP. Initial examination fees must be paid after applications have been approved before you can schedule your examination.

If you need to retake the exam, and your eligibility period is still current, you may do so for a substantial discount subject to regional and membership pricing rules. Additionally, once an examination date is confirmed and scheduled, you may be subject to cancellation or no-show fees.

Once scores are received, you may request a manual hand score if your original test was not delivered on a computer but instead using a paper based administration. The fee for a hand rescore is \$45 USD.

Lastly, renewing your PMP Certification will require a payment based on regional and membership pricing rules.

We currently support USD, Euros, BRL, and INR currencies.

PMI accepts the following payment methods: credit card and wire transfer

Please note that reexamination fees are waived for candidates who have had their exam scores invalidated solely due to data forensics evidence.

PMP Examination Information

The PMP examination is comprised of 180 questions. Of the 180 questions, 5 are considered pretest questions. Pretest questions do not affect the score and are used in examinations as an effective and legitimate way to test the validity of future examination questions. All questions are randomly placed throughout the examination. For a list of current item types included in the exam, please refer to the [PMP Exam Updates page](#) on pmi.org.

No. of Scored Questions	No. of Pretest (Unscored) Questions	Total Examination Questions
175	5	180

The allotted time to complete the center-based examination is 230 minutes.

Allotted Examination Time
230 Minutes

It may take you less than the allotted time to complete the examination.

For the **PMP** exam, there are now two 10-minute breaks in the exam. The first will appear after you complete questions 1- 60 and review all of your answers. The second break will appear after you have completed question 120 and confirmed that you have reviewed all of your answers. Please note, once you review your responses and start your break you will not be able to return to the questions from the previous section of the exam.

When you are signed back in after each break, you will have the remaining allotted time to complete the remaining section(s). In total, you will have 230 minutes to respond to 180 questions.

The examination is **preceded by a tutorial and followed by a survey**, both of which are optional, and take 5-15 minutes to complete. The time used to complete the tutorial and survey is not included in the examination time of 230 minutes.

Retaking the Exam

If you do not pass your first exam attempt, we encourage you to continue your study and retake the exam. You may take the examination up to three times within your one-year eligibility period. After three attempts, you must wait one year from the date of the last examination before you reapply for the certification. This policy is designed to uphold exam security and reduce overexposure of examination questions to individual candidates. However, during this year you are welcome to apply for any other PMI certification.

If your one year eligibility period expires without you passing the examination, you must reapply for the certification.



POWERING THE PROJECT ECONOMY™



**Exhibit C.II - Second
Prong - Well-
Positioned to
Advance the
Proposed Endeavor**

**Please refer to all the
documents of Exhibit B**



THIS IS TO CERTIFY THAT

Antonio Donatti

HAS BEEN FORMALLY EVALUATED FOR DEMONSTRATED EXPERIENCE, KNOWLEDGE AND PERFORMANCE IN
ACHIEVING AN ORGANIZATIONAL OBJECTIVE THROUGH DEFINING AND OVERSEEING PROJECTS AND
RESOURCES AND IS HEREBY BESTOWED THE GLOBAL PROFESSIONAL CERTIFICATION

Project Management Professional (PMP)®

IN TESTIMONY WHEREOF, WE HAVE SUBSCRIBED OUR SIGNATURES UNDER THE SEAL OF THE INSTITUTE

A handwritten signature in black ink, reading 'Ike Nwankwo'.

Ike Nwankwo, PMP | Chair, Board of Directors



A handwritten signature in black ink, reading 'Pierre Le Manh'.

Pierre Le Manh | President & CEO

Certification Number: 4187735

Original Grant Date: 14 September 2025
Citizenship: Brazil

Expiration Date: 14 September 2028





Membership Card

Antonio Donatti

CHAPTERS

Santa Catarina, Brazil Chapter

MEMBER ID

11945835

MEMBER SINCE

9/2025

EXPIRATION

9/2026



Bylaws of the Project Management Institute, Inc.

Version 3.9

Last Revised: October 2023

Bylaws Table of Contents

Article Name	Page
Article I: Name and Principal Office.....	3
Article II: Purposes and Limitations of the Institute.....	3
Article III: Membership in the Institute.....	4
Article IV: Membership Dues, Fees and Assessments	6
Article V: Membership Meetings	7
Article VI: PMI Board of Directors.....	8
Article VII: Officers of the Institute.....	11
Article VIII: Meetings of the PMI Board of Directors.....	13
Article IX: President and Chief Executive Officer	14
Article X: PMI Components and other Subsidiary Groups	15
Article XI: Allied and Cooperative Relationships	17
Article XII: Governance.....	17
Article XIII: Finance and Budget	18
Article XIV: Indemnification	20
Article XV: Amendments to the Bylaws.....	21
Article XVI: Dissolution	22
Article XVII: Adoption of Bylaws.....	22

BYLAWS OF THE PROJECT MANAGEMENT INSTITUTE, INC.

Article I: Name and Principal Office

Section A. Name/Non-Profit Incorporation.

The name of the corporation shall be the Project Management Institute, Inc., which may be abbreviated as PMI® or the Institute. The Project Management Institute, Inc., is incorporated as a non-profit, tax-exempt corporation organized under the laws of the United States of America and the Commonwealth of Pennsylvania, as a professional association for the purposes set forth herein and in the Articles of Incorporation.

Section B. Principal Office; Other Offices.

The principal office of PMI shall be located in the Commonwealth of Pennsylvania, unless otherwise designated by the PMI Board of Directors. The Institute may have such other offices at such suitable places, within or outside the Commonwealth of Pennsylvania, as may be designated by the PMI Board of Directors.

Article II: Purposes and Limitations of the Institute

Section A. Purposes of the Institute.

1. **General Purposes.** The Institute has been founded as an autonomous, non-profit, tax-exempt, membership association dedicated to advancing the state-of-the-art in effective and appropriate application of the practice and science of project management.
2. **Specific Purposes.** Consistent with the PMI Articles of Incorporation and these Bylaws, the purposes of the Institute shall include the following:
 - a. To foster professionalism in the management of projects.
 - b. To contribute to the quality and scope of project management.
 - c. To stimulate appropriate global application of project management for the benefit of the general public.
 - d. To provide a recognized forum for the free exchange of ideas, applications, and solutions to project management issues among Institute members, and others interested and involved in project management.
 - e. To identify and promote the fundamentals of project management and advance the body of knowledge for managing projects successfully.

- f. To collaborate with universities, other educational institutions, and corporate entities to encourage appropriate education and career development at all levels of project management activities.
- g. To provide a guiding influence in academic and industrial research in the field of project management.
- h. To seek and foster international cooperation and contacts with other organizations, both public and private, which relate to project management and to collaborate in matters of common interest and benefit.
- i. To identify, develop, foster, and maintain professional, practice, ethical, credentialing and accreditation standards and principles.

Section B. Limitations.

1. General Limitations. The purposes and activities of the Institute shall be subject to limitations set forth in these Bylaws, and conducted in compliance with Section 501(c)(6) of the U.S. Internal Revenue Code. In addition, the purposes and activities of the Institute shall be restricted as follows:
 - a. No part of the net earnings of the Institute shall inure to the benefit of, or be distributed to, the directors or officers, or other private persons, except that the Institute shall be authorized to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of, and consistent with, the purposes set forth in these Bylaws and applicable PMI policies.
 - b. The Institute shall not engage in any activities relating to election campaigns for candidates seeking political office, nor shall any agent, representative, officer, director, or employee engage in such activities on behalf of the Institute.
2. PMI Board of Directors Authority. The PMI Board of Directors shall have the authority, responsibility and accountability to develop, establish, approve, and enforce policies and procedures necessary to implement the requirements of this Article.

Article III: Membership in the Institute

Section A. General Membership Provisions.

Membership in PMI shall be open to any person interested in the declared purposes of the Institute, consistent with the requirements and member qualifications of these Bylaws and applicable PMI policies, established by the PMI Board of Directors. Qualified persons seeking membership will be accepted as a member of the Institute upon the submission, receipt, acceptance, and processing of the required application materials, dues, fees, and assessments.

Member rights are defined as the opportunity to vote on Institute matters and to hold elected or appointed office, as defined in these Bylaws. Privileges are defined as those tangible and intangible benefits, products and services offered with membership in the Institute. The PMI Board of Directors shall establish the privileges associated with membership.

Section B. Classes and Categories of Members.

The Institute shall establish and maintain the following classes and qualifications of membership, each class with the rights hereinafter provided:

1. Regular Member. Any person who is interested in, or engaged in, the practice, teaching or other application of project management, including research concerning project management, may qualify as a Regular Member of the Institute. Regular Members shall have voting rights and may hold any elected or appointed office in the Institute.
2. Retiree Member. Any person who has been a PMI Member in good standing for five (5) consecutive years, and who has retired from active employment, qualifies for PMI Retiree membership. Retiree Members shall have all rights of the Regular Member class.
3. Student Member. Any person currently enrolled as a full-time student in an undergraduate or graduate degree program from an accredited or globally equivalent college or university may qualify for PMI Student membership. Student Members shall have voting rights. Student Members shall not be entitled to hold any elected office in the Institute, except that Student Members may hold office and vote within a PMI Chapter, as may be granted in the Chapter Bylaws.
4. Associate Member. Any person who joins the Institute to access limited privileges pursuant to policies duly adopted by the PMI Board of Directors. Associate Members shall not be entitled to exercise any voting rights, and shall not be a candidate for, nor hold any elected or appointed office in the Institute.

Section C. Membership Resignation, Suspension, Expulsion, Termination or Transfer.

1. Resignation. Any member may submit a written resignation to the Corporate Secretary of the Institute, or other duly designated representative. Such a resignation shall become effective upon receipt, consistent with applicable policies, except that a resignation may not prevent the Institute from completing any ethics, disciplinary, or similar proceeding.
2. Suspension/Expulsion. Pursuant to a fair process and under procedures duly adopted by the PMI Board of Directors, any member may be suspended or expelled from membership by a three-fourths (3/4ths) affirmative vote of the PMI Board of Directors.
3. Termination. Following notice by invoice, and consistent with these Bylaws and applicable policies, the Institute may terminate the membership of any member who has not satisfied membership requirements related to the payment of all applicable dues, fees, and assessments.

4. Transfer. Membership in the Institute is not transferable to any other person, regardless of category or classification.

Section D. Member Ethical Standards and Procedures.

The PMI Board of Directors, or the voting membership of the Institute, may adopt and publish ethical standards which apply to all classes of membership. In the event ethical standards are adopted, the PMI Member Ethical Standards shall govern the activities and professional behavior of all PMI members and shall prohibit, among others, violations of these Bylaws and policies of the Institute.

Article IV: Membership Dues, Fees and Assessments

Section A. Institute Dues, Fees, and Assessments.

1. General. PMI shall be entitled to assess yearly membership dues, fees, and other assessments from each member of the Institute, for all categories of membership. All such dues, fees, and other assessments will be due and payable in advance of each year of membership in such amounts as are approved by the PMI Board of Directors.
2. Non-Payment of Dues. Any member who has not paid all applicable dues, fees, and other assessments shall be in default and shall not be entitled to exercise any rights and privileges of membership until such time as all such current yearly dues, fees, and assessments are paid in full. Members who pay all dues, fees and assessments in arrears within one hundred (100) days of notice of the default shall not lose any membership seniority or similar status. Non-payment of all dues, fees and assessments in arrears will be deemed a resignation of PMI membership status.
3. PMI Board Authority/Dues, Fees, and Assessment Reduction and Waiver. The PMI Board of Directors shall have the authority to develop, establish, and enforce policies to determine, amend, modify, and, in special circumstances, reduce or waive fees, dues, and assessments for special and particular reasons, including, but not limited to, financial hardship and other appropriate considerations.

Section B. Component Dues, Fees, and Assessments.

1. General. Unless otherwise authorized by the PMI Board of Directors, only PMI Members are eligible for membership in PMI Components (PMI Components are described in Article X.) The governing body of each PMI Component, shall be permitted to establish Component dues and fees, pursuant to duly adopted component policies and procedures, which are subject to approval of the PMI Board of Directors.
2. Billing and Distribution. Unless otherwise authorized by the PMI Board of Directors, all Component dues shall be billed and collected by PMI. Following collection, such dues shall be distributed to the appropriate Component, subject to applicable PMI policies and procedures.

Article V: Membership Meetings

Section A. Annual Membership Meeting.

The Institute shall conduct an Annual Membership Meeting each year and on a date to be established by the PMI Board of Directors. The PMI Board of Directors shall announce such date and location for the subsequent Annual Membership Meeting at each current Annual Membership Meeting. The PMI Board of Directors may also call other membership meetings, as deemed necessary.

Section B. Special Membership Meetings.

Special meetings of the members of the Institute may be called by the PMI Board of Directors or by 10% or more of the eligible voting members. Upon the written request of the PMI Board of Directors, or the members who have called the meeting, the Corporate Secretary shall fix the time of the meeting at any appropriate location and place, and provide the appropriate notice to the members.

Section C. Membership Meetings - Notice

The Institute shall provide to all PMI members in good standing a notice of each Annual Membership Meeting and other membership meetings. Such notice shall be provided at least sixty (60) days in advance of the Annual Membership Meeting or other membership meetings, and shall state: the time and place of the meeting; and a description of the business to be transacted. No business other than that specified in the notice shall be transacted at a membership meeting.

Section D. Member Questions and Resolutions.

The PMI Board of Directors shall give members of the Institute reasonable opportunities to express their views on questions, and to present resolutions in an appropriate manner. Upon ninety (90) days' notice and a petition signed by five percent (5%) or more of the voting membership to the Corporate Secretary, a question and resolution shall be submitted to the quorum of voting members present at the next scheduled Annual Membership Meeting of the Institute. Except where a larger vote is required by law or by these Bylaws, a question affirmed by a majority of the eligible members voting and present shall be binding upon the PMI Board of Directors unless determined to be contrary to applicable law or regulations.

Section E. Quorum Requirements.

A quorum of the eligible voting membership of the Institute shall exist at any Annual Membership Meeting for the purpose of voting on all questions, resolutions, and other actions, so long as the Annual Membership Meeting has been properly announced and questions have been submitted consistent with the requirements of these Bylaws and applicable law.

Section F. Voting Procedures and Balloting.

1. **Voting Procedures.** All votes of the Institute membership taken at the Annual Membership Meeting will be conducted by appropriate ballot. Each voting member is entitled to one vote per question or resolution only. Unless otherwise required by the Articles of Incorporation, these Bylaws, or applicable law, all actions of the membership shall be carried by a majority vote. Except with respect to PMI ballots, voting by proxy shall not be permitted.
2. **Balloting.** With respect to any question or resolution which is submitted to voting Institute members, by law or these Bylaws, for a vote without attendance at a meeting, the Institute shall transmit a ballot to the last known postal, telephonic, electronic or other appropriate destination address of each voting member provided to the Institute in accordance with paragraph 3 below, which shall be deemed to be good and sufficient notice of such vote and meeting. Each completed ballot returned to the Institute shall be deemed a limited proxy authorizing and directing that the vote is to be entered in the manner indicated on the ballot only. The sale or transfer of a vote is strictly prohibited. All questions, resolutions, and other actions submitted for balloting shall be carried by a majority vote of the members voting, unless otherwise required by these Bylaws or applicable law.
3. **Voting Means.** The means employed for member voting may be by any means permitted by law, including but not limited to mail, telephonic and/or electronic processes, as the President and Chief Executive Officer of the Institute may determine is reasonable and appropriate to ensure the integrity of the voting process.

Article VI: PMI Board of Directors

Section A. PMI Board of Directors.

1. **General.** The Institute shall be governed by an elected PMI Board of Directors. It is the duty of the PMI Board of Directors to carry out the purposes and objectives of the non-profit corporation.
2. **Authority.** The PMI Board of Directors shall be vested with the powers possessed by the non-profit corporation itself, including the powers, accountability and authority to: uphold and execute the organization's purposes; appoint and remunerate agents and employees; disburse funds of the Institute; purchase, lease, sell, transfer and otherwise convey property; and establish and adopt such policies, rules, and regulations for the conduct of its business, responsibility, and authority as will be deemed advisable, insofar as any exercise or delegation of authority is consistent with, and does not conflict with, the Articles of Incorporation or Bylaws of the Institute (in their present form or as amended), or applicable law.

The PMI Board of Directors may establish and maintain boards and similar bodies that will serve as independent boards within the Institute. Any such board may be granted certain autonomous authority and responsibility by the PMI Board of Directors through formal charter, to develop Bylaws, policies, programs and procedures concerning the operation of the autonomous board. All such

boards shall operate consistent with these Bylaws and subject to the limitations of their formal charter.

3. Functions. Accountable to the PMI membership, the PMI Board of Directors shall be responsible and accountable for strategic planning and the establishment of policy with respect to activities of the Institute. The PMI Board of Directors shall oversee the management, control and supervision of the business, as well as other lawful activities and affairs deemed necessary to further the objectives of the Institute, including an annual report to PMI members.
4. PMI Board Composition. The PMI Board of Directors shall be comprised of five (5) to eighteen (18), at large, voting PMI Board Directors. One (1) voting member of the PMI Board Directors shall be elected and serve as Chair of the Institute consistent with the requirements of Article VII, below.
5. PMI Board Limitations/Conduct. The PMI Board of Directors shall be granted the authority to establish policies and procedures specifying PMI Board of Directors limitations and conduct including, but not limited to, the following:
 - a. Compensation for Services. Directors (including Officers) shall not receive any compensation, or other tangible or financial benefit for service on the PMI Board of Directors. However, the PMI Board of Directors may authorize payment by the Institute of actual, reasonable expenses incurred by Directors regarding attendance at PMI Board of Directors meetings and other approved activities.
 - b. Compensation from Institute Activities. Directors (including Officers) shall not receive any compensation, or other tangible or financial benefit from any element or activity of, or related to, the Institute, except as reimbursement for actual, reasonable expenses directly associated with such Institute element or activity, when authorized by the PMI Board of Directors.
 - c. Corporation and Director Independence/Loyalty. All PMI Board Directors (including Officers) shall act in an independent manner consistent with their obligations to the Institute and applicable law, regardless of any other affiliations, membership, or positions.
 - d. Nothing in this section is intended to limit the reasonable compensation received by an Appointed Officer who is an employee of the Institute.

Section B. Directors of the Institute.

1. Director Qualifications. All Directors of the Institute shall be eligible members in good standing for the past two (2) consecutive years. The PMI Board of Directors may, in its discretion, determine additional qualifications for Directors consistent with these Bylaws.
2. Length of Terms. Each Director shall be elected by the voting membership of the Institute and shall serve a term of three (3) years. Directors shall serve no more than two (2) consecutive terms and no more than a total of nine (9) years of service as a voting Director on the Board.
3. Nomination/Election. Candidates for election will be nominated by the Nominating Committee, as set forth in Section C, below. The terms of the Directors shall be staggered to ensure that approximately one-third of the Director terms of office expire each year. All PMI Board Directors shall be elected by

secret ballot by the voting membership of the Institute, the results of which shall be announced no later than the Annual Membership Meeting.

4. Resignations. A Director may resign at any time by submitting a written resignation to the Chair of the Institute. Any resignation will be effective as of the time specified in the written resignation, or, if no date is specified, as of the acceptance date of the written resignation as determined by the Chair.
5. Removal. A Director, who is no longer a member in good standing of the Institute, shall be removed and replaced by the PMI Board of Directors. A Director may also be removed by operation of applicable law, or by a two-thirds (2/3rds) affirmative vote of the PMI Board of Directors for cause at any regular or special meeting at which a quorum of the PMI Board is present; and in accordance with PMI Board of Directors adopted policies and procedures.
6. Vacancies. In the case of a vacancy, resignation, or removal of a PMI Board Director, the remaining Directors shall appoint another qualified individual to fill the vacancy for the unexpired portion of the term. The length of terms specified in Article VI, Section B, Paragraph 2 will apply to appointments to fill vacancies. The service for the duration of the unexpired term, under this section, will count in the calculation for term limits under Section B, 2 above.

Section C. Nominating Committee.

1. Establishment and Purpose. A Nominating Committee shall be established to oversee and supervise the nominating process for Directors of the Institute, and shall ensure appropriate procedures are in place for the selection and presentation of qualified candidates to the membership.
2. Appointments. The PMI Board of Directors shall appoint a Nominating Committee Chair, who shall not be a current Director of the Institute, and also appoint three (3) to five (5) members to serve on the Nominating Committee.
3. Authority and Duties. Among other authority and duties, the Nominating Committee shall conduct the following activities under the leadership of the Committee Chair: the timely review and study of the credentials of qualified Director Nominees; the timely presentation of qualified, individual nominees and slates of candidates for open Director positions. The Nominating Committee shall circulate to all members who are entitled to vote, the names of qualified and appropriate nominees and slates at least sixty (60) days prior to the Annual Membership Meeting. The qualified candidates receiving the largest number of qualified member votes shall be elected to each open Director position. Where a tie exists between two or more nominees, the PMI Board of Directors shall elect a winner. The results of each election shall be announced at the Annual Membership Meeting.
4. Geographic Diversity Goals. The Nominating Committee shall make all reasonable and appropriate efforts to assure that the individual Director candidates presented to the membership constitute a geographically diverse group, which will represent the interests of Institute members throughout the world.
5. Balloting. All Directors elections shall be administered by the President and Chief Executive Officer and shall be conducted by ballot, to the eligible voting members of the Institute by any method permitted by applicable law, including but not limited to mail, telephonic or electronic processes, as the President and

Chief Executive Officer of the Institute may determine is reasonable and appropriate to ensure the integrity of the voting process.

6. Disputes. Any disputes concerning the nomination or election process shall be determined under the Institute's Complaint, Dispute, and Grievance Resolution Policy and Procedures, as it may be in effect from time to time.

Section D. Committees.

1. The PMI Board of Directors may establish and maintain committees, subject to such limitations, policies and rules as the PMI Board of Directors may adopt, to assist it in the performance of its duties.
2. Nothing in this Article shall affect the provisions of Article VI. C. of these Bylaws relating to the Nominating Committee.

Article VII: Officers of the Institute

Section A. Elected Officers of the Institute.

1. Officer Titles. The Institute shall have the following Officers: a Chair; a President and Chief Executive; a Corporate Secretary; a Treasurer; and such other Officers as the Board may from time to time establish in the Rules of the Board. Officers may be elected by the Board pursuant to these Bylaws or they may be appointed to an Officer role due to their position in the Institute because of their job function as an employee of the Institute, as further stated in these Bylaws. The Chair is elected by the Board and is deemed an Elected Officer. The President and Chief Executive Officer, the Corporate Secretary and the Treasurer are deemed Appointed Officers.
2. Officer Qualifications and Authority. Elected Officer of the Institute shall be elected from among all Directors of the Board, whose term will be active in the period for which an Officer is being elected. Officers of the Institute shall be bound by, be responsible and accountable to the PMI Board of Directors for satisfying resolutions and directives of the PMI Board of Directors, and shall have the authority and accountability conferred and granted by these Bylaws. Officers shall have such other authority, accountability and duties as may be conferred and granted by the PMI Board of Directors.
3. Election/Terms of Office. The Elected Officers of the Institute for the following year shall be elected at the last scheduled meeting of the current PMI Board of Directors and shall take office the first day of the new year following the meeting at which they are elected. The term of office for an Officer shall be one (1) year, or until a successor assumes office. Unless otherwise and specifically authorized by these Bylaws, no Elected Officer shall serve more than two (2) consecutive terms nor more than two (2) years, in the same office. The term for Appointed Officers of the Institute is dependent on their maintaining their job function as an employee of the Institute.

4. Vacancies. In the event that an Elected Officer is unable to complete an elected term for any reason, the PMI Board of Directors shall elect a successor to complete the unexpired portion of an Elected Officer's term at the next special or regularly scheduled PMI Board of Directors meeting pursuant to these Bylaws.
5. Removal. Any Elected Officer may be removed from Office by the PMI Board of Directors for cause whenever in its judgment the best interests of the Institute will be served thereby. An Officer of the Institute may be removed by a two-thirds (2/3rds) vote of the Directors present at any regular or special meeting of the PMI Board of Directors at which a quorum is present; and in accordance with PMI Board of Directors adopted policies and procedures.

Section B. Chair Qualifications and Duties.

1. Qualifications. The Chair of the Institute shall be elected by the incoming PMI Board of Directors from among the elected PMI Board Directors whose terms will be active in the period for which Officers are being elected.
2. General Duties. The Chair of the Institute shall serve as the Chair of the PMI Board of Directors. The Chair shall have the authority, powers, and responsibilities commonly incident to and vested in, the corporate offices of Chief Elected Officer and Chair of the PMI Board of Directors, consistent with these Bylaws, including, but not limited to: the role of presiding Officer at each membership meeting of the Institute; the role of presiding Officer at all PMI Board of Directors meetings; the direction of other Officers; the responsibility to satisfy directives of the PMI Board of Directors; the designation and appointment of Institute representatives and project managers, subject to PMI Board of Directors approval; the preparation and distribution of all PMI Board of Directors meeting agendas; and the general knowledge and responsibility for supervision of the business of the Institute.
3. Specific Duties. In addition to any other duties and authority, the Chair shall also perform the following duties as the Chair: appoint such committee chairs and members, as may be required, consistent with and subject to any limitations or different appointment process which the PMI Board of Directors may otherwise determine to be appropriate; and perform other duties as the PMI Board of Directors may delegate consistent with these Bylaws.

Section C. Appointed Officers of the Institute.

1. Appointed Officers - Pursuant to Pennsylvania Nonprofit Corporation Law of 1988 § 5732 every nonprofit corporation shall have a president, a secretary, and a treasurer, or persons who shall act as such regardless of the name or title by which they may be designated, elected or appointed and may have such other officers and assistant officers as it may authorize from time to time. The office of Secretary shall be the General Counsel of the Institute and the Treasurer shall be the Chief Financial Officer, both of which are appointed by the President and CEO.
2. Corporate Secretary.
 - a. General Duties. Except as may be specifically delegated to a PMI Board Committee or other individual as designated by a PMI Board of Directors approved Charter or Rule of the Board, the

Secretary shall have and perform all duties commonly incident to, and vested in, the corporate offices of secretary, as well as all duties delegated and designated by the PMI Board of Directors or the President and CEO.

- b. Specific Duties. Except as may be specifically delegated to a PMI Board Committee or other individual by a PMI Board of Directors approved Charter or Rule of the Board, the duties and authority of the Secretary shall include, but not be limited to: accountability for the accuracy of board documents, such as true minutes of all such meetings and all notices given in accordance with these Bylaws.

3. Treasurer.

- a. General Duties. Except as may be specifically delegated to a PMI Board Committee or other individual as designated by a PMI Board of Directors approved Charter or Rule of the Board, the Treasurer shall have and perform all duties commonly incident to, and vested in, the corporate offices of treasurer, as well as all duties delegated and designated by the PMI Board of Directors or the President and CEO.
- b. Specific Duties. Except as may be specifically delegated to a PMI Board Committee or other individual by a PMI Board of Directors approved Charter or Rule of the Board, the duties and authority of the Treasurer shall include, but not be limited to management and execution of all fiscal and financial investment policies of the Institute.

Article VIII: Meetings of the PMI Board of Directors

Section A. Annual and Regular Meetings.

The Annual Meeting of the PMI Board of Directors (Annual Board Meeting) shall be held to coincide with the PMI Annual Membership Meeting, or at a time and place designated by a majority of the PMI Board of Directors, for the transaction of business that comes before the PMI Board of Directors. There shall be at least one (1) other regular meeting of the PMI Board of Directors each year at a place designated by a majority of the PMI Board of Directors for the transaction of such business as may come before the PMI Board of Directors. Notice of regular meetings of the PMI Board of Directors may be provided in any manner determined by the PMI Board of Directors. Regular meetings may be held via telephone conference or similar form of telecommunications which permits all Director participants to communicate and effectively participate during the meeting.

Section B. Special Meetings.

Special meetings may be called by a majority of the PMI Board of Directors or the Chair by filing a written request for such a meeting with the Corporate Secretary stating the purpose, place, date, and hour therefore, due written notice having been given to each Director at least five (5) days prior to the date of the meeting, or fifteen (15) days' notice where an in-person meeting is called. Special meetings may be held via telephone

conference, or similar form of telecommunications, which permits all Director participants to communicate and effectively participate during the meeting.

Section C. Quorum.

A majority of the Directors shall constitute a quorum of any meeting of the PMI Board of Directors. Such a majority shall be capable of transacting any business authorized by, or as may be provided in, these Bylaws and the Articles of Incorporation. Except as otherwise provided in these Bylaws or by law, the act of a majority of Directors present at a meeting at which a quorum is present at the time shall be the act of the PMI Board of Directors.

Section D. PMI Board Actions.

Every decision of the PMI Board of Directors shall be by a majority vote unless otherwise required by law, the policies of the PMI Board of Directors, or these Bylaws. Each Director shall be entitled to one vote on any matter coming before the PMI Board of Directors.

Section E. Special Action by the PMI Board without Meeting.

Any action required or permitted to be taken at a meeting of the PMI Board of Directors may be taken without a meeting if consent in writing, setting forth the action taken, is signed by all PMI Board Directors. Such consent shall have the same force and effect as an affirmative vote at a meeting duly called. The signed consent(s), or a signed copy, shall be placed in the minute's book of the PMI Board of Directors.

Section F. Proxies.

Unless provided otherwise in these Bylaws or by law, voting by proxy shall not be permitted.

Article IX: President and Chief Executive Officer

Section A. Appointment.

The PMI Board of Directors shall appoint and engage a qualified individual to the position of President and Chief Executive Officer. The President and Chief Executive Officer shall report to the full PMI Board of Directors, and shall be responsible and accountable for the supervision, control, and management of the Institute in its administrative, business, financial, and other affairs.

Section B. Authority and Duties of the President and Chief Executive Officer.

The President and Chief Executive Officer shall have the authority and duty, both regarding members of the Institute and staff, to implement all policies of the Institute in a lawful manner and in accordance with generally accepted business and financial principles and ethical standards and the responsibility to report to the PMI Board of Directors concerning these affairs. Among other authority, the President and Chief Executive Officer shall have the authority to: hire and dismiss employees and other personnel of the Institute including consultants, contractors and the like; establish all terms and duties of employment and hiring; develop PMI annual operating programs, products, services, and budgets; and, legally bind the Institute and sign on its behalf contracts, checks, drafts, notes, mortgages, leases and other legal documents, without limitation by reason of specification. The President and Chief Executive Officer shall attend and participate in all meetings of the PMI Board of Directors, except during closed executive sessions when it is so determined. The President and Chief Executive Officer shall perform such other duties as may be elsewhere specified in these Bylaws or as may from time to time be designated by the PMI Board of Directors.

Article X: PMI Components and other Subsidiary Groups

Section A. Establishment and Purposes.

1. Establishment. The PMI Board of Directors shall develop and approve policies and criteria which control and regulate the establishment and operation of chartered subsidiary Components, and other groups, consistent with the authority and limitations granted in the Articles of Incorporation, these Bylaws, and applicable Institute policies. Each Component shall be established only through the submission and approval of a Component Charter and Bylaws which shall be consistent with all applicable Component policies and criteria developed and approved by the PMI Board of Directors.
2. Purposes. The primary purposes of Components shall be to advance the general and specific purposes of PMI.

Section B. Categories.

The PMI Board of Directors, or groups of Institute members subject to PMI Board of Directors approval, may establish and maintain Components, which shall be a grouping of Institute members. These may include, but are not limited to the following:

1. PMI Chapter. A group of Institute members within a distinct and definable geographical area.

In addition to the Components identified in this Article, the PMI Board of Directors may authorize and approve the establishment of other groupings of PMI members which the PMI Board of Directors, in its sole discretion, has determined will further the purposes and objectives of the Institute.

Section C. Authority and Limitations.

Authority. Components shall have the authority and the duty to carry out the purposes of their charter and Bylaws, as approved by the PMI Board of Directors and consistent with the Bylaws of the Institute.

Limitations. Components are limited to activities set forth in their approved charter. At all times, the Charter, the Bylaws, and the activities of any Component must be consistent with these Bylaws, applicable policies, and all legal requirements including those in the jurisdiction in which the Component is located.

Section D. Charter Review and Maintenance.

1. Charter Review. The PMI Board of Directors may review each Component Charter on an annual basis to ensure compliance with all Component requirements and policies established by the PMI Board of Directors. The PMI Board of Directors retains the sole and exclusive authority to approve, suspend, deny, or revoke any Component Charter, consistent with these Bylaws and all applicable policies. In the event that probationary action is recommended and approved by the PMI Board of Directors, the Component Charter may be suspended.
2. Charter Maintenance. Each Component shall be responsible for maintaining and updating its Charter to ensure proper operation and continued compliance with these Bylaws and all applicable policies, and shall be responsible for demonstrating such compliance to the PMI Board of Directors.

Section E. Membership.

Component membership is open to, and limited to, any Institute member who meets the qualifications for such Component membership.

Section F. Use of PMI Intellectual Property.

Chartered Components shall use PMI names, trademarks, logos, symbols and other intellectual property in a manner which is consistent with these Bylaws and all applicable policies.

Section G. Dissolution.

The PMI Board of Directors shall dissolve any Component by revocation or non-renewal of the Component Charter, by declaring that the grouping of members is no longer a PMI component. Revocation and/or non-renewal of a Component Charter shall occur when the PMI Board of Directors determines that the Component is no longer a viable entity, or that such an action is in the best interests of the Institute and in accordance with applicable policies.

Article XI: Allied and Cooperative Relationships

Section A. Establishment and Purposes.

The PMI Board of Directors may promote such cooperative relationships with other project management groups, institutions or entities, including global organizations, where such relationships will serve to further the interests and objectives of the Institute. The PMI Board of Directors shall develop and approve policies and procedures to govern the establishment of cooperative relationships. The President and Chief Executive Officer shall be responsible for the development and implementation of all general Allied or Cooperative Agreements. The PMI Board of Directors shall be kept informed of new and changed agreements by the President and Chief Executive Officer.

Article XII: Governance

Section A. Authorization to Act on Behalf of the Institute.

Except as provided in these Bylaws or in the Articles of Incorporation, or by applicable law, no Director, Officer, employee, representative, office holder, or other agent of the Institute may act on behalf of the Institute or hold himself or herself out to the public as authorized to act on behalf of the Institute without the prior express, written approval of the PMI Board of Directors.

Section B. Fiscal Year.

Unless modified by the PMI Board of Directors, the fiscal year of the Institute shall begin on January 1 and terminate on December 31.

Section C. Parliamentary Procedures.

The rules contained in the most recently revised edition of *Roberts Rules of Order*, shall govern the proceedings of the PMI Board in any instances not otherwise provided for in these Bylaws or by PMI Board adopted policy and procedure.

Section D. U.S. Internal Revenue Code.

All references in these Bylaws to sections of the U.S. Internal Revenue Code shall be considered references to the Internal Revenue Code of 1986, as from time to time amended, to the corresponding provisions of any applicable future U.S. Internal Revenue laws, and to all regulations issued under such provisions.

Section E. Severability.

If any portion of these Bylaws shall be invalid or inoperative, then, so far as reasonable, the remainder of these Bylaws shall be considered valid and operative.

Section F. Notice.

Whenever these Bylaws require notice to be given, the notice may be given in any manner permitted by law.

Section G. Language.

English shall be the official business language of the Institute.

Article XIII: Finance and Budget

Section A. Annual Budget.

A budget showing anticipated revenue and authorized expenses shall be adopted annually by the PMI Board of Directors. The annual budget for succeeding years shall be consistent with PMI Board-approved annual budgeting policies and procedures.

Section B. Accounting.

Accounting for the finances of the Institute shall conform to the recommended practices of the American Institute of Certified Public Accountants.

Section C. Independent Audits.

The PMI Board of Directors shall provide for an annual audit of the Institute's finances and financial statement by an independent auditor. Results of such audit shall be reported to the PMI Board of Directors. The President and Chief Executive Officer shall submit regular, scheduled statements of account to the PMI Board of Directors. The auditor and auditor selection requirements shall comply with the auditor independence rules, as well as all other professional practice standards and requirements, mandated by American Institute of Certified Public Accountants (AICPA) and any other governing entity or body. The results of such audit shall be reported to the PMI Board of Directors.

The external financial auditor engagement will be considered to be put out to bid annually after five (5) years, with a mandatory bidding process every ten (10) years. This will involve a full Request for Proposal (RFP) process from qualified bidders. The selection process for a new external auditor should begin twelve (12) months prior to the expiration of the current engagement. If the same firm is selected, partner rotation will be mandatory. In interim years, the Board of Directors retains the right to request proposals to change auditors.

The Board of Directors has sole authority to appoint or terminate the external auditor. The Audit and Risk Committee and PMI staff:

- Recommend to the Board of Directors when it is appropriate to issue a Request for Proposal (RFP) before the expiration of the current engagement.
- Design the RFP process, review the respondents to the process, and make a recommendation based on their evaluation of the proposals.

Section D. Liabilities.

No member, officer, director, committee, chair, department, employee, agent or representative of the Institute shall have authority or power to expend Institute funds, incur liability, or make any commitment for the Institute that will bind the Institute or create any financial liability, unless specifically authorized by these Bylaws or by the prior express, written approval of the PMI Board of Directors.

Section E. Contracts.

The PMI Board of Directors authorizes each Officer and the President and Chief Executive Officer or the President and Chief Executive Officer's designee to enter into any contract or execute and deliver any instrument in the name and on behalf of the Institute. In addition, the PMI Board of Directors may authorize other agents of the Institute to enter into any contract, or execute and deliver any instrument, in the name and on behalf of the Institute. Such authority must be expressly granted in writing prior to the execution of the contract or instrument.

Section F. Property.

The PMI Board of Directors may take, receive, hold, sell, lease, and otherwise convey real and personal property. The PMI Board of Directors may delegate any responsibilities with respect to such property to the President and Chief Executive Officer. However, the PMI Board of Directors may not purchase, sell, mortgage, lease away, or otherwise dispose of its real property unless authorized by a vote of two-thirds (2/3rds) of the PMI Board of Directors.

Section G. Checks, Drafts, Notes.

The PMI Board of Directors authorizes each Officer, the President and Chief Executive Officer, or their authorized designee(s), to issue checks, drafts, or other orders for the payment of money, notes or other evidences of indebtedness in the name of the Institute.

Section H. Bonding.

As may be determined by the PMI Board of Directors, any elected Officers, Board Directors, or Committee members, approved and authorized agents, and employees, including the President and Chief Executive Officer, of the Institute who are responsible for collection, disbursement, investment, or safekeeping of funds,

may be furnished a fidelity bond for the faithful performance of their duties, in such form and amount (sum) as the PMI Board of Directors shall prescribe and approve.

Article XIV: Indemnification

Section A. Indemnification.

In the event that any person who is or was a Director, Officer, employee, trustee, authorized representative, or agent of the Institute (representative), acting in good faith and in a manner he reasonably believed to be in the best interests of the Institute, has been made party, or is threatened to be made a party, to any threatened, pending or completed action or proceeding by reason of being a representative, whether civil, criminal, administrative, or investigative (other than an action or proceeding by or in the right of the corporation), such representative may be indemnified against reasonable expenses and liabilities, including attorney fees, actually and reasonably incurred, judgments, fines, and amounts paid in settlement in connection with such action or proceeding. Where the representative was successful in defending the action, indemnification is mandatory.

Section B. Determination of Proper Indemnification.

Unless ordered by a court, discretionary indemnification of any representative shall be approved and granted only when consistent with the requirements of applicable law, and upon a determination that indemnification of the representative is proper in the circumstances because the representative has met the applicable standard of conduct required by law and in these Bylaws.

Section C. Indemnification Not Exclusive of Other Rights/Court Determinations.

1. Extent of Indemnification. The indemnification provided under this Article shall not be deemed exclusive of any other rights to which those seeking indemnification may be entitled under the Articles of Incorporation, these Bylaws, any agreement, vote of disinterested Directors, or otherwise, both as to actions in his or her official capacity and as to actions in another capacity while holding office, and any such indemnification shall continue as to a person who has ceased to be a Director, Officer, employee, trustee, authorized representative, or agent, and shall inure to the benefit of the heirs, executors, and administrators of such person.
2. Effect of Court Determinations. Indemnification made pursuant to this Article shall not be made in any case where the act, or failure to act, giving rise to the claim for indemnification is determined by a court to have constituted willful misconduct or recklessness.

Section D. Liability Insurance.

To the extent permitted by applicable law, the Institute may purchase and maintain insurance on behalf of any person who is or was a Director, Officer, employee, trustee, agent, or other authorized representative of the Institute, or is or was serving at the request of the Institute as a Director, Officer, employee, trustee, agent or other representative of another corporation, domestic or foreign, non-profit or for profit, partnership, joint venture, trust, or other enterprise.

Article XV: Amendments to the Bylaws

Section A. Amendment Procedure.

1. **Bylaws Amendment by Membership.** Other than clerical changes, all sections of these Bylaws relating to the following subjects may be amended only by a vote of a majority of the voting membership of the Institute:

- a. purposes and limitations of the Institute; [Article II, Sections A and B]
- b. voting rights of members; [Article III, Sections A and B., and Article V, Section F]
- c. classes and qualifications of membership; [Article III, Section B]
- d. termination or transfer of membership; [Article III, Section C]
- e. regular member meetings; [Article V, Section A]
- f. amendment of member voting provisions; [Article V, Sections D, F; Article XV, Section A.1]
- g. [member] quorum; [Article V, Section E]
- h. action by members; [Article V, Section F]
- i. member action by proxy; [Article V, Section F]
- j. *[existence]* authority of the PMI Board of Directors; [Article VI, Sections A.1, A.2, and A.3]
- k. selection and removal of Directors; [Article VI, Sections A.5, B.5, and C]
- l. judges of election (Nominating Committee); [Article VI, Section C.1 and C.2]
- m. voting rights of Directors; [Article VIII, Section D]
- n. wind up and distribution (dissolution). [Article XVI]

Any other subjects reserved to the voting membership by Pennsylvania statute may only be amended by a majority vote of the Institute membership.

In order for a Bylaws amendment by the voting membership to be valid and effective, proper notice is required. Proper written notice under this section shall consist of a copy of the text of the proposed amendment, including any relevant explanatory materials, whether transmitted by mail, facsimile transmission, or other appropriate means, that is sent to each member at least sixty (60) days prior to the meeting. Notice by mail shall be deemed sufficient if sent to the last known address furnished to the Institute. Members may submit proposed amendments to these Bylaws by resolution pursuant to the requirements of Article V, Section D.

2. Bylaws Amendment by the PMI Board of Directors. All other sections of these Bylaws may be amended at any meeting of the PMI Board of Directors by an affirmative vote of two-thirds (2/3rds) of all Directors then holding office, provided that proper written notice of the proposed Bylaw change is given to each Director at least fifteen (15) days prior to the meeting. Proper written notice under this section shall be a copy of the text of the proposed amendment, including any relevant explanatory materials, whether transmitted by mail, facsimile transmission, or other appropriate means. Notice by mail shall be deemed sufficient if sent to the last known address furnished to the Institute.

Section B. Amendment Effective Date.

An amendment to these Bylaws shall be effective immediately upon adoption, unless another effective date is specifically determined by the PMI Board of Directors, upon adoption of such amendment.

Article XVI: Dissolution

Section A. Disposition of Assets.

Upon dissolution of the Institute, in accordance with applicable Pennsylvania or other law, and after paying or making provisions for the payment of all liabilities, the PMI Board of Directors shall dispose of all assets of the Institute in a manner consistent with any relevant legal requirements concerning the Institute's tax exempt and non-profit status, and exclusively to one or more non-profit organizations having similar aims, purposes, or objectives as the Institute, and which may be selected as an appropriate recipient(s) of certain assets, so long as such organization(s) shall then qualify as an organization or organizations exempt from federal income taxation under Section 501(c)(6) of the U.S. Internal Revenue Code, or other controlling law.

Article XVII: Adoption of Bylaws

Section A. Resolution to Adopt Bylaws.

The Project Management Institute, Inc., was organized under the laws of the Commonwealth of Pennsylvania in 1969. These Bylaws hereby nullify and replace the PMI Constitution and Bylaws last amended in October 1997. These Bylaws were adopted by the voting membership of the Institute, and no less than a two-thirds (2/3rds) vote of the PMI Board of Directors, and become effective January 1, 1999.



This is to certify that
Antonio Donatti

is a member of Project Management
Institute, the world's leading association
for those who consider project, program,
or portfolio management their profession;
and upholds the Institute's Code of Ethics
and Professional Conduct.

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Feedback





PMI Membership

Unlock opportunity with
PMI membership

Join PMI for exclusive access to career development
resources, project tools, and a global community.



Boost **career growth** and level up your skills with free and
discounted professional education and certification.

Impact **project success** with members-only tools,
resources, and expertise.

Connect with a **global community** of more than 750,000
Project Professionals.

Stay in the know and ahead of the curve

A career in project management means being dedicated to lifelong learning. Use the resources
below to fuel your growth and excel within the ever-changing project landscape.

AI	—
Agile	+
Careers	+
Sustainability	+

Feedback

Your Path to Giving Back



Membership unlocks local chapter volunteer
opportunities

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Understanding the Purchasing Managers' Index (PMI) for Economic Insight

By [THE INVESTOPEDIA TEAM](#) Updated April 08, 2026

Reviewed by [ROBERT C. KELLY](#)

Fact checked by [KATRINA MUNICHELLO](#)

PURCHASING MANAGERS INDEX

DEFINITION:

The Purchasing Managers' Index (PMI) is an [economic indicator](#) that assesses the business environment by surveying purchasing managers at private-sector companies about their expectations for orders, production, employment, and supplier deliveries.

KEY TAKEAWAYS

- The PMI is based on a monthly survey of [supply chain](#) managers.
- The PMI ranges from 0 to 100; above 50 signals expansion.
- The ISM publishes a Hospital PMI surveying inventory and healthcare traffic.
- Global PMI represents 90% of global GDP through surveys from 28,000+ companies.
- High PMI readings indicate economic growth; below 50 indicates contraction.



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The PMI is based on monthly surveys that gather data from purchasing managers across various sectors.
Credit: Zoe Hansen / Investopedia

Exploring the Purchasing Managers' Index (PMI)

A monthly Purchasing Managers Index (PMI) for the manufacturing sector is developed by the [Institute for Supply Management \(ISM\)](#), a nonprofit supply management organization. The ISM also tallies a monthly PMI for the service sector and hospitals. ^[1]

It is a diffusion index that summarizes whether market conditions are expanding, staying the same, or contracting, as viewed by purchasing managers.

FAST FACT

The Purchasing Managers' Index (PMI) indicates economic health for [sectors](#) like manufacturing.

How the PMI Functions in Financial Markets

The [manufacturing PMI](#) gives equal weight to new orders, production, employment, supplier deliveries, and inventories. ^[2] The ISM services PMI includes information compiled from non-manufacturing sectors, such as transportation, insurance, construction, and education. ^[3] A PMI provides insight into the business environment and helps companies see where the [economy](#) is headed.

The ISM Report on Business contains PMIs based on surveys. Each PMI is calculated based on responses from senior executives at multiple companies across various industries, which are weighted by their contribution to the U.S. [gross domestic product \(GDP\)](#). ^[1] The surveys include questions about business conditions, whether or not they are changing, and whether they are improving or deteriorating.



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FAST FACT

The ISM also publishes a Hospital PMI, which surveys inventory levels, supplies, and healthcare patient traffic. ^[4]

Who Utilizes the PMI and Why?

- **Corporate Managers:** They may use the monthly PMI results to make key decisions about future business. For example, an automobile manufacturer makes production decisions based on new orders that drive purchasing decisions about parts and [raw materials](#). Existing inventory balances also drive the amount of production the manufacturer needs to complete to fill new orders and to keep some inventory on hand at the end of the month.
- **Suppliers:** A manufacturer's parts supplier follows the PMI to estimate future demand. The supplier must determine how much inventory its customers have on hand, which affects the production that its clients generate.
- **Investors:** PMI is a [leading indicator](#) of economic conditions. The direction of the trend in the PMI may signal changes in the estimates of economic activity and output, such as GDP, industrial production, and employment.

FAST FACT

A company can use the PMI to help plan its [annual budget](#), manage staffing levels, and forecast cash flow.

What Is the Impact of PMI Information on Pricing?

PMI information about [supply and demand](#) might affect the prices that suppliers can charge. If new orders increase, then a manufacturer may raise customer prices and accept a supplier's price increases. When new orders decline, the manufacturer may lower its prices and demand a lower cost for the parts it purchases.

What Is the Global PMI?

The Global PMI is an economic indicator compiled by S&P Global, derived from survey responses from over 28,000 global companies, and represents 90% of global GDP. ^[5]

What Is the Significance of a High PMI Reading?

The Purchasing Managers' Index can range between 0 and 100. If the index reading is higher than 50, then it indicates an economic expansion. A reading below 50 indicates an economic contraction, with readings closer to 0



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The Bottom Line

Investors, [economists](#), and analysts have a wealth of information to help them gauge where the economy is trending. One leading indicator is the Purchasing Managers' Index.

Released monthly, the PMI is derived from a survey by the Institute for Supply Management for the manufacturing, services, and healthcare sectors. The results are used by managers, suppliers, and [investors](#) in their decision making.



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HOW OFTEN IS THE ISM MANUFACTURING INDEX RELEASED?

WHY ARE PURCHASING MANAGERS CRUCIAL FOR ASSESSING ECONOMIC CONDITIONS?

WHAT DOES AN ISM MANUFACTURING INDEX READING ABOVE 50 SIGNIFY?

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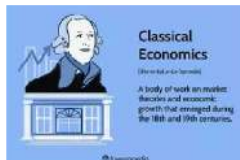
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By Julie Young



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By The Investopedia Team



Guide to Microeconomics

Consumer Theory Explained: Definition, Goals, and Real-World Applications

By Daniel Liberto

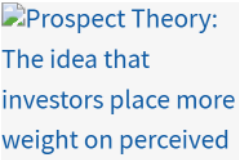


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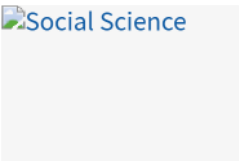
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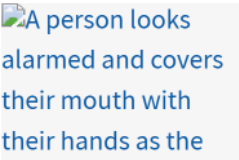
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Antonio Donatti

is awarded the designation
Certified Scrum Product Owner® on this day,
May 17, 2025, for completing the prescribed requirements
for this certification and is hereby entitled to all privileges
and benefits offered by SCRUM ALLIANCE®.



Certificant ID: 001755633 Certification Active through: 16 May 2027

Rodrigo Toledo
Certified Scrum Trainer®

Tristan Boutros
Chief Executive Officer

Certificate of Course Completion

Generative AI Overview for Project Managers

Presented to:

Antonio Donatti

Friday, April 10, 2026

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Data Landscape of GenAI for Project Managers

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AI in Agile Delivery

Presented to:

Antonio Donatti

10 April 2026

Exhibit C.II - Second Prong: Letters of Support

February 9, 2026

To whom it may concern,

I am Cláudia Cunha, currently serving as the OPME Purchasing Coordinator at Saúde Petrobras, where I have had the opportunity to evaluate and oversee Mr. Antonio Donatti's contributions to high-impact technological projects. My professional background is rooted in the healthcare sector, holding degrees in both Nursing and Dentistry, complemented by specialized postgraduate studies in Health Auditing, Occupational Nursing, and Health Management and Hospital Administration. With over two decades of experience in the supplementary health industry, I have held leadership roles in health auditing, claims analysis, and strategic negotiations with providers and suppliers. My expertise in managing Orthotics, Prosthetics, and Special Materials (OPME) within complex regulatory frameworks, such as those established by the Brazilian National Regulatory Agency for Private Health Insurance and Plans (ANS), enables me to rigorously and technically assess the effectiveness of specialized solutions and the professionals who implement them.

I first became acquainted with Mr. Donatti's work in 2024, during a critical period at Saúde Petrobras for evaluating, selecting, and implementing a specialized quotation and management platform for OPME. At that time, in my capacity as a senior technical leader and coordinator, I was directly involved in validating the project's functional and operational requirements to ensure the selected technology aligned with our institutional protocols and stringent cost-control goals. Mr. Donatti served as the manager responsible for EMS Ventura's projects and products and was our primary technical and managerial point of contact. Throughout the project lifecycle, from the initial Request for Information to final execution, our professional relationship was characterized by a high degree of collaboration. We worked closely to ensure the operational flows were not only efficient but also fully compliant with the regulatory standards governing the Brazilian healthcare market.

The most significant interactions I had with Mr. Donatti occurred during the technical presentation and subsequent implementation of the EMS Ventura platform. He demonstrated exceptional mastery of the subject matter, articulating clearly how the proposed technological solution would address our complex needs in supplier management, product traceability, and automated workflows. His consultative approach was instrumental in ensuring the security of our decision-making, as he bridged the gap between formal technical requirements and the practical, day-to-day demands of our auditing and purchasing operations. During the implementation phase, I observed his meticulous project coordination, marked by transparent communication, a well-structured schedule, and a steadfast commitment to quality and institutional compliance.

The results of the project led by Mr. Donatti were transformative for Saúde Petrobras. By replacing manual and fragmented processes with a centralized, automated governance model, we achieved a new level of operational maturity. The integration of the entire OPME acquisition process, from initial quotation to proof of use in surgical procedures, significantly strengthened our compliance with ANS requirements and internal protocols. Centralizing data increased the traceability of our decisions and eliminated information dispersion across

multiple systems. Most notably, implementing managerial dashboards enabled real-time monitoring of negotiation outcomes, revealing savings exceeding 35 percent in OPME negotiations. These results surpassed the aggressive targets set by our senior management and demonstrated the profound impact of Mr. Donatti's strategic vision on our financial and operational efficiency.

Mr. Donatti's performance as a project and product manager is distinguished by his disciplined planning, clear scope definition, and deep understanding of the regulatory and economic nuances of the healthcare sector. His ability to deliver stable, evolving platforms has left a lasting legacy at Saúde Petrobras, raising the standard for OPME management and ensuring the sustainability of our cost-containment strategies.

Based on this successful professional experience, I would welcome the opportunity to work with Mr. Antonio Donatti again without any reservations. I highly recommend him for professional engagements within healthcare administration and healthtech environments. His proven ability to deliver measurable results and generate tangible value in complex operations makes him an asset to organizations operating in high-institutional-relevance contexts. I fully support his professional endeavors and remain available to provide any additional information if needed.

Sincerely,

Cláudia Cunha

Cláudia Cunha

OPME Purchasing Coordinator, Saúde Petrobras

Rio de Janeiro, Brazil

LinkedIn: www.linkedin.com/in/cláudia-cunha-481b2a114

Contact

www.linkedin.com/in/cláudia-cunha-481b2a114(LinkedIn)

Main Competencies

- Customer Service
- Healthcare
- Team leadership

Cláudia Cunha

1st OPME Purchasing Coordinator
Rio de Janeiro, Rio de Janeiro, Brazil

Summary

Professional with experience in people management, coordination, leadership, auditing in supplemental healthcare and hospital settings, claims analysis, authorizations, and negotiation with suppliers (*Orthotics, Prosthetics, and Special Materials - OPME*), managing contracts with accredited providers, and strategic category management.

Work Experience

- Saúde Petrobras
5 years
OPME Purchasing Coordinator
March 2024 - Present (1 year 11 months)
- Senior Technical Audit Analyst
February 2021 - Present (5 years)
Rio de Janeiro, Brazil
- Rede D'Or São Luiz
2 years 11 months
Medical Accounts Coordinator
September 2019 - February 2021 (1 year 6 months)
- Lead Nurse
April 2018 - February 2021 (2 years 11 months)
- UNITED HEALTH GROUP
Supply Technical Analyst
January 2017 - April 2018 (1 year 4 months)
- Petrobras
OPME AUDIT NURSE
August 2010 - December 2016 (6 years 5 months)
PETROBRAS

Leader of the OPME team (nurses and administrative staff), auditing special materials authorizations. Participates in Cost Control Management. Provides external consulting for authorizations and payments. Member of the committee for negotiating registrations and pricing tables with suppliers and accredited hospitals - contracts. Responsible for the Working Group on OPME consolidation (procedure protocols vs. materials) in the RJ Region.

Golden Cross
CLAIMS ANALYSIS COORDINATOR
October 2009 - August 2010 (11 months)
RIO DE JANEIRO

Coordinate the medical accounts audit team, planning and implementing methodologies, and developing the department. Assess the area's situation - workflow, controls and contracts, team profile, internal and external interface areas, deadlines, negotiation methods, pricing tables, and associated costs. Conduct studies to restructure the area, focusing on optimizing cost-benefit relationships with accredited providers.

Semic
Nursing Coordinator
March 2001 - January 2008 (6 years 11 months)

Academic Background

DNA GRADUATE STUDIES COFEN SP
Lato Sensu Graduate Studies, Healthcare Services Auditing · (May 2023 - December 2023)

Integrated Colleges of Jacarepaguá
Lato Sensu Graduate Studies, Occupational Nursing · (January 2014 - March 2015)

Estácio de Sá University
Lato Sensu Graduate Studies, Health Management and Hospital Administration · (2007 - 2009)

Unigranrio University
Bachelor's Degree in Dentistry · (1993 - 1997)

Unigranrio University

Bachelor's Degree in Nursing and Obstetrics · (1989 - 1992)

I, Carolina Favero da Silva, telephone number 415 425-2508, mailing address P.O. Box 90487, San Diego, CA 92169, certify that the professional translation of this document from Portuguese to English has been performed by myself, a qualified translator fluent in both languages, and that the following is an accurate and complete translation of the document.



Date: March 2, 2026.

Contato

www.linkedin.com/in/cláudia-cunha-481b2a114 (LinkedIn)

Principais competências

- Atendimento ao Cliente
- Cuidados da saúde
- Liderança de equipe

Cláudia Cunha

1° Coordenadora de Compras em Opme
Rio de Janeiro, Rio de Janeiro, Brasil

Resumo

Profissional com experiência em gestão de pessoas, Coordenação, Liderança, Auditoria em Saúde Suplementar e hospital, com análise de sinistros, autorização e negociação com os fornecedores (OPME) , contratos com credenciados (prestadores) e categoria estratégica.

Experiência

Saúde Petrobras
5 anos

Coordenadora de Compras em Opme
março de 2024 - Present (1 ano 11 meses)

Analista Auditoria Técnica Sênior
fevereiro de 2021 - Present (5 anos)
Rio de Janeiro, Brasil

Rede D'Or São Luiz
2 anos 11 meses

Coordenadora de Contas Médicas
setembro de 2019 - fevereiro de 2021 (1 ano 6 meses)

Enfermeira Lider
abril de 2018 - fevereiro de 2021 (2 anos 11 meses)

UNITED HEALTH GROUP
Analista técnica de Suprimentos
janeiro de 2017 - abril de 2018 (1 ano 4 meses)

Petrobras
ENFERMEIRA AUDITORA EM OPME
agosto de 2010 - dezembro de 2016 (6 anos 5 meses)
PETROBRAS

Líder da equipe de OPME (enfermeiros e administrativos), auditoria em autorização de materiais especiais. Participa na Gestão de Controle de Custos. Realiza consultoria externa para autorização e pagamento. Integrante da Comissão de negociação de cadastro e tabelas com os fornecedores e credenciados (hospitais)- contratos. Responsável pelo Grupo de Trabalho para o consolidado de OPME (protocolos de procedimentos x materiais) na Regional RJ.

Golden Cross

COORDENADORA DE ANÁLISE DE SINISTROS

outubro de 2009 - agosto de 2010 (11 meses)

RIO DE JANEIRO

: Coordenar a equipe de auditoria de contas médicas, Planejamento e implantação de metodologias e desenvolvimento do departamento, avalia a situação da área - fluxo de trabalho, controles e contratos, perfil da equipe, áreas de interface internas e externas, prazos, forma de negociação, tabelas e valores envolvidos, realiza estudos para reestruturação da área focando a melhor relação custo x benefício com os credenciados.

Semic

Coordenadora de enfermagem

março de 2001 - janeiro de 2008 (6 anos 11 meses)

Formação acadêmica

DNA PÓS COFEN SP

Pós-graduação Lato Sensu, Auditoria em Serviços de Saúde · (maio de 2023 - dezembro de 2023)

Faculdades Integradas em Jacarepaguá

Pós-graduação Lato Sensu, Enfermagem do Trabalho · (janeiro de 2014 - março de 2015)

Universidade Estácio de Sá

Pós-graduação Lato Sensu, Gestão de Saúde e Administração Hospitalar · (2007 - 2009)

Universidade Unigranrio

Odontologia · (1993 - 1997)

To Whom It May Concern,

My name is Eduardo Porto, and I serve as the Regional Manager at Sherwin-Williams Automotive Finishes, based out of Milford, Massachusetts. With over a decade of professional experience in large-scale corporate environments, I have an extensive background in management, operations, strategic sales, and business development. In my current capacity, I oversee the financial and operational performance of nineteen stores across the Northeastern United States and directly lead a workforce of approximately eighty employees, including management and operations teams. My role entails full accountability for financial results, process governance, and data-driven decision-making within a framework that prioritizes operational efficiency and regulatory compliance. I write this independent letter in support of Mr. Antonio de Azevedo Donatti's proposed endeavor in the United States.

I do not have personal knowledge of Mr. Donatti's work. My assessment of his profile is based on an expert independent evaluation of the professional materials provided to me, including his curriculum vitae, performance records on technology and management projects, and detailed descriptions of initiatives he led in the supplementary healthcare sector and other regulated environments. Based on this comprehensive review, I have formed a technical opinion on the applicability and significance of his skill set, particularly for organizations operating under high operational complexity and rigorous control requirements.

The materials analyzed present Mr. Donatti as a professional with extensive experience in project management and technological product development, characterized by a data-oriented approach. To provide context, project and product management in the technology sector involves aligning objectives, personnel, and timelines, and translating operational needs into implementable solutions, all while requiring continuous performance monitoring. Furthermore, his track record demonstrates a deep familiarity with regulated environments, where traceability, standardization, and governance are key to mitigating risk and ensuring consistent execution.

Another significant aspect of his profile, as detailed in the documentation, is the integration of process automation, systems interoperability, governance, and the strategic utilization of data. In practical terms, this reflects a specialized ability to structure workflows that minimize redundancy, bridge disconnected systems, and facilitate decision-making based on reliable information. This combination of competencies is notably distinct because it involves a mastery of technology, management, and analytics. In my professional observation of the U.S. industrial and service sectors, there is a substantial gap of qualified professionals who possess this systemic vision. While many have isolated technical knowledge, few can integrate data governance with operational transformation as Mr. Donatti has demonstrated.

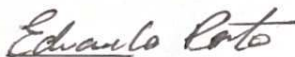
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Based on this independent evaluation, it is my professional opinion that Mr. Donatti has a profile uniquely suited to the current challenges faced by healthcare organizations in the United States, such as hospitals, clinics, and healthtechs. These entities are currently struggling with rising operational costs and the urgent need to integrate systems to improve care capacity. Mr. Donatti's expertise in operational automation and analytics is directly aligned with the national need for more efficient, value-oriented care models. His ability to reduce administrative inefficiencies and strengthen organizational governance addresses a critical shortage in the American labor market.

For these reasons, I recommend Mr. Donatti as a technical and strategic reference. I remain available to provide any further clarification that may be required.

Sincerely,

02/25/2026



Eduardo Porto

Regional Manager

Sherwin-Williams Automotive Finishes

EDUARDO PORTO

7 BALIAN WAY MILFORD, MA 01757
PHONE 774-242-5143 • EDUARDO.D.PORTO@SHERWIN.COM

PROFESSIONAL SUMMARY

Results-driven sales professional with over 10 years of progressive experience in Industrial and Automotive sales. Proven track record of exceeding sales targets, mentoring teams, and driving business development in competitive markets. Adept at strategic planning, value selling, pipeline management and cross-functional enterprise collaboration.

EDUCATION

University of Massachusetts

Amherst, MA

Bachelor of Arts in Economics, May 2015

Peer Mentor, Economics department

WORK EXPERIENCE

Sherwin-Williams Automotive Finishes

MA/CT/NY/NJ/PA/DE

Regional Manager, December 2025 – Present

- Leading financial and operational performance for 19 branches in the Northeast Region, overseeing P&L, strategic growth, and operational excellence.
- Managing \$42M in annual sales, driving profitable revenue expansion across the region.
- Directing all branch functions including safety compliance, inventory optimization, sales strategy, and market expansion initiatives.
- Leading and developing a high-performing team of 80 employees, including managers and front-line staff, through coaching, performance management, and talent development.

Sherwin-Williams General Industrial

MA/NH/VT

Sales Representative, January 2024 – December 2025

- Exceeded Sales Budget with a 19% increase.
- Mentored new LDP in the NE area.
- Collaborated with the lab, technical team, sales reps, BDMs, SAMs to drive new business.
- Engaged in business development in Medical Device space with major OEMs like Draeger, J&J and ASP.

Sherwin-Williams Automotive Finishes

Worcester, MA

Sales Representative, July 2019 – December 2023

- Continuously exceed sales and profit goals winning multiple awards.
- Conducted successful product demos and conversions.
- Mentored multiple new reps throughout tenure.
- More than doubled territory sales.

Sherwin-Williams Automotive Finishes

Worcester, MA/Medford, MA

Branch Manager, March 2016 – June 2019

- Increased business with multi-shop owners and jobber distribution segments.
- Developed key customer relationships resulting in profitable business growth.
- Reduced controllable costs.
- Leveraged private label brands to protect margins.
- Consistently met and exceeded branch PBT budget.
- Grew customer base with focus on A and B shops.
- Led and developed 10 employees and created systems to maximize efficiency.

Sherwin-Williams Automotive Finishes

Worcester, MA

Assistant Branch Manager, July 2015 - February 2016

- Worked to exceed branch sales and PBT targets through budget analysis and tactful utilization of outside vendors.
- Managed inventory levels to maximize sales and profit.
- Managed branch drivers to coordinate driving routes for timely deliveries.
- Laser-focused customer service driving customer retention.

Follett Higher Education Group**Amherst, MA**

Sales Associate, August 2014 - April 2015

- Assisted in store sales.
- Resolved problems within customer service department.
- Addressed customer questions and concerns.

College Works Painting**Greater Boston, MA**

Branch Manager, February 2012 - August 2012

- Met with prospective clients daily.
- Door to door sales.
- Held cold call sessions to acquire customers.

SKILLS

- Business: CRM Strategy, P&L Management, KPI Tracking, Value-Based Selling, Team Coaching & Development.
- Computer: MS Office, Salesforce CRM, Tableau, SAP Concur.
- Language: Fluent in Portuguese, Proficient in Spanish.

HIGHLIGHTS AND SPECTRUM AWARDS

- President's Club Award - 2022
- Master's Club Award - 2023
- Emerging Leaders Program – 2024
- Master's Club Award -2025

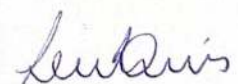
02/03/2026

To whom it may concern,

It is with enthusiasm that I write this letter in support of Mr. Antonio de Azevedo Donatti. I am a professional in the supplementary health sector with over fifteen years of experience in auditing, regulation, procurement, and the management of High-Cost Medical Devices (OPME) and high-cost medications. I hold a Bachelor of Nursing from the Veiga de Almeida University (Universidade Veiga de Almeida), a specialization in Health Auditing from the São Camilo University Center (Centro Universitário São Camilo), and an MBA in Leadership, Team Management, and Productivity from the Pontifical Catholic University of Rio Grande do Sul (Pontifícia Universidade Católica do Rio Grande do Sul - PUC RS). Throughout my career, I have held technical and managerial leadership roles at prominent institutions, including Golden Cross, CABERJ, Assim Saúde, and Rede D'Or São Luiz. Currently, I serve as the manager of OPME and medications at Unimed do Brasil, the National Confederation of Medical Cooperatives (Confederação Nacional das Cooperativas Médicas), where I coordinate guidelines, compliance, and sector policies for the entire Unimed System at the national level.

I have worked with Mr. Donatti on projects across several institutions in the supplementary health sector, implementing and evolving technological solutions developed by EMS Ventura, where he serves as a manager. We worked together on strategic projects at Golden Cross, a nationally established private health insurer in Brazil, CABERJ, a public-sector health benefits institution in the state of Rio de Janeiro that supports large beneficiary populations through administratively complex supplemental healthcare programs, and most recently at Unimed do Brasil, Brazil's largest healthcare insurance firm. In these contexts, Mr. Donatti served as the project and product manager, leading scope definition, operational flow organization, system implementation, and integration between technical and healthcare areas.

During our collaboration at Golden Cross, I observed Mr. Donatti's performance in structuring systemic led to a measurable 34 percent reduction in OPME acquisition costs. Later, at CABERJ, we focused on implementing oncology medication management. This project involved the full control of the delivery cycle, treatment monitoring, and healthcare traceability, which required a high degree of systemic integration and regulatory adherence. Under his management, we achieved a 28 percent reduction in costs while strengthening financial control and reducing healthcare risks.



Currently, at Unimed do Brasil, I am following the large-scale implementation of the EMS Ventura platform for the national management of procurement and delivery of OPME and medications. This project covers everything from quotation to supplier billing and post-surgical reports. Mr. Donatti has demonstrated a unique ability to integrate project management and technology with a deep knowledge of the health sector. He also conducts ongoing training for teams to ensure proper tool use and sustain the improvements. His work contributes to consolidating best practices and standardizing processes at the sectoral level, which is essential to the sustainable evolution of supplementary health.

Based on the professional excellence and impact demonstrated throughout our years of collaboration, I fully support Mr. Donatti's professional endeavor. You can contact me at lu_holiveira@hotmail.com should you need more information.

Sincerely,



Luíza Reis

Manager of OPME and Medications

Unimed do Brasil - National Confederation of Medical Cooperatives

Contact

www.linkedin.com/in/luíza-reis
(LinkedIn)

Main competences

Global strategy
Data analysis
Strategy

Luíza Reis

Nurse / Supplemental healthcare / Audit / DMI / OPME / ANS
Regulation
Rio de Janeiro, Rio de Janeiro, Brazil

Summary

Nursing Specialist with a focus on Auditing in supplemental healthcare and extensive experience in Purchasing - OPME (*Orthotics, Prosthetics, and Special Materials*) and Team Management.
I have a professional track record marked by excellence in auditing surgical processes, negotiating with suppliers, and managing high-performance teams.

Work Experience

Grupo Caberj
Surgical Regulation and Purchasing Coordinator - OPME / Pharmacy
September 2024 - July 2025 (11 months)
Rio de Janeiro, Brazil

Golden Cross
6 years 7 months
Surgical Regulation and Purchasing Coordinator - OPME
June 2022 - July 2024 (2 years 2 months)
Rio de Janeiro, Brazil

OPME Purchasing Coordinator
January 2018 - June 2024 (6 years 6 months)
Rio de Janeiro, Rio de Janeiro

B2 Saúde
Auditor Nurse
May 2021 - December 2022 (1 year 8 months)
On-call - Emergencies and Diagnostic Exams

Assim Saúde
Auditor Nurse - OPME
January 2016 - January 2018 (2 years 1 month)
OPME Auditing

Rios D'Or Hospital - Rede D'Or São Luiz
Central Authorizations Coordinator
July 2013 - January 2016 (2 years 7 months)
Rio de Janeiro and Surrounding Region, Brazil

Handled elective surgery requests, post-surgical follow-up, and surgery scheduling.

B2 Saúde
Auditor Nurse
January 2012 - August 2013 (1 year 8 months)
Rio de Janeiro, Rio de Janeiro
OPME auditing and medical regulation

Academic Background

PUC-RS (*Pontifical Catholic University of Rio Grande do Sul*)
MBA in Leadership, Team Management, and Productivity, Human Resources
with an Emphasis on Organizational Leadership · (September 2023 - May 2025)

Up time
English · (2017 - 2018)

Veiga de Almeida University
Bachelor's Degree in Nursing · (2007 - 2010)

São Camilo University Center
Healthcare Auditing

I, Carolina Favero da Silva, telephone number 415 425-2508, mailing address P.O. Box 90487, San Diego, CA 92169, certify that the professional translation of this document from Portuguese to English has been performed by myself, a qualified translator fluent in both languages, and that the following is an accurate and complete translation of the document.



Date: March 2, 2026.

Contato

www.linkedin.com/in/luíza-reis
(LinkedIn)

Principais competências

Estratégia global
Análise de dados
Estratégia

Luíza Reis

Enfermeira/ Saúde suplementar / Auditoria/ DMI/ OPME/ Regulação
ANS
Rio de Janeiro, Rio de Janeiro, Brasil

Resumo

Especialista em Enfermagem com ênfase em Auditoria na saúde
suplementar e vasta experiência em Compras- OPME e Gestão de
equipes.
Possuo uma trajetória profissional marcada pela excelência em
auditoria de processos cirúrgicos, negociação com fornecedores e
gestão de equipes de alto desempenho.

Experiência

Grupo Caberj
Coordenador Regulação Cirúrgica e compras- OPME / Farmácia
setembro de 2024 - julho de 2025 (11 meses)
Rio de Janeiro, Brasil

Golden Cross
6 anos 7 meses
Coordenadora Regulação Cirúrgica e compras- OPME
junho de 2022 - julho de 2024 (2 anos 2 meses)
Rio de Janeiro, Brasil

Coordenadora de compras- OPME
janeiro de 2018 - junho de 2024 (6 anos 6 meses)
Rio de Janeiro, Rio de Janeiro

B2 Saúde
Enfermeira auditora
maio de 2021 - dezembro de 2022 (1 ano 8 meses)
Plantão- Urgências e Exames

Assim Saúde
Enfermeira Auditora- OPME
janeiro de 2016 - janeiro de 2018 (2 anos 1 mês)
Auditoria de OPME

Hospital Rios D'Or - Rede D'Or São Luiz
Coordenadora Central de Autorizações
julho de 2013 - janeiro de 2016 (2 anos 7 meses)
Rio de Janeiro e Região, Brasil

Solicitações de cirurgias eletivas, tratativa de pós ciurgico, marcação de cirurgia.

B2 Saúde
Enfermeira auditora
janeiro de 2012 - agosto de 2013 (1 ano 8 meses)
Rio de Janeiro, Rio de Janeiro
Auditoria em OPME e regulação médica

Formação acadêmica

PUC-RS
MBA em Liderança, Gestão de Equipes e Produtividade, Gestão de Pessoas com Ênfase em Liderança Organizacional · (setembro de 2023 - maio de 2025)

Up time
Ingles · (2017 - 2018)

Universidade Veiga de Almeida
Bacharelado, Enfermagem · (2007 - 2010)

Centro Universitário São Camilo
Auditoria em saude

To Whom It May Concern,

My name is Priscilla Araujo Ferreira, and I serve as Supervisor of Hospital Supplies at Unimed Nacional, one of the largest healthcare operators in Brazil. I have more than eleven years of experience in hospital supply management, overseeing strategic processes related to high-cost medications and implants and medical devices (IMD) at a national level. In this role, I have had the opportunity to directly observe the work of Antonio de Azevedo Donatti on projects of high relevance to our organization.

I first met Mr. Donatti in August 2020, during the implementation of strategic projects conducted by EMS Ventura for Unimed Nacional - CNU. At that time, I was responsible for the management, negotiation, and control of high-cost medications and IMD. Mr. Donatti, acting as the project manager for EMS Ventura, led the technical and strategic implementation of the solutions and served as the primary interface between EMS Ventura and the operational areas of Unimed Nacional. Our professional relationship developed in a collaborative manner, and he continued to lead the evolution of the implemented solutions, the delivery of new functionalities, and the execution of system integrations, consistently aligned with regulatory requirements, patient care needs, and operational efficiency objectives.

One of the most significant professional interactions occurred during the conception, implementation, and evolution of the oncology medication and chronic patient management project at Unimed Nacional - CNU. In this context, Mr. Donatti demonstrated strong technical and strategic performance throughout the entire lifecycle of the solution, from design to production deployment. He notably led the systemic integration initiative between Unimed Nacional and medication suppliers, defining workflows for authorization, external confirmation, delivery control, automatic status return, and billing integration. This work required a deep understanding of clinical care processes, as well as compliance with ANS and ANVISA regulatory standards, in addition to addressing the operational challenges inherent in managing high-cost medications.

Throughout these initiatives, Mr. Donatti worked closely with our hospital supplies, auditing, medical billing, and technology teams, translating complex operational requirements into integrated, automated, and scalable technological solutions. I observed his ability to structure robust processes, reduce reliance on manual activities, mitigate clinical and operational risks, and ensure full traceability of medications. His leadership in automating oncology treatment cycles resulted in greater predictability, enhanced patient safety, and improved operational efficiency, demonstrating a strong systemic vision in a highly regulated healthcare environment.

The projects led by Mr. Donatti significantly transformed Unimed Nacional - CNU's management of oncology and high-cost medications. Processes that were previously manual were replaced by an automated, integrated, and data-driven model. The implementation of systemic workflows for authorization, external confirmation, delivery control, automatic status return, and billing integration led to substantial gains in operational efficiency and patient safety. These initiatives improved treatment cycle predictability, reduced the risk of delays, enhanced financial controls, and strengthened governance over regulated processes. Automation reduced rework, increased traceability, and supported faster and more informed decision-making.



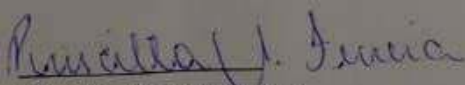
Among the measurable results, there was a significant reduction in the average time required for authorization and confirmation of oncology medication delivery. The project reduced operational rework and manual interventions, increasing productivity by more than 35 percent. Processes that previously required up to five business days for validation were reduced to one business day. Additionally, the solution strengthened financial controls and traceability, contributing to waste reduction and improved managerial decision-making.

Mr. Donatti stands out for his unique combination of advanced information technology expertise and strategic vision applied to the highly regulated supplementary healthcare sector. He quickly understands complex processes and translates them into robust, secure, and scalable technological solutions. His leadership in automating critical medication flows, conducting systemic integrations, and addressing regulatory requirements established by ANS and ANVISA represents a set of highly differentiated competencies. His work consistently emphasizes data-oriented processes, ensuring traceability, governance, regulatory compliance, and operational efficiency.

His ability to connect technical, operational, and strategic areas, with a clear focus on measurable and sustainable impact, distinguishes him from other professionals in the field. His projects reduced manual dependencies, mitigated risks, and established management models that can be replicated in other organizational contexts. The solutions he delivered remain operational and evolutive, aligned with future institutional needs, contributing to digital maturity and long-term sustainability in the healthcare sector.

Based on my direct professional experience, I would work with Mr. Donatti again without any reservation. His consistent competence, strategic vision, and sense of responsibility in managing critical projects—particularly those involving high-cost medications and IMD, are evident. He delivers structured, secure, and sustainable solutions with a deep understanding of operational, regulatory, and financial impacts. His ability to anticipate risks and propose continuous improvements clearly differentiates his work. I confidently recommend Mr. Donatti for projects or organizations that require operational efficiency, governance of regulated processes, systemic integration, and cost control. His contributions generate tangible, measurable, and lasting impact.

Sincerely,



Priscilla Araujo Ferreira
Supervisor of Hospital Supplies, Unimed Nacional
priscilla.ferreira@unimednacional.coop.br

Contact

www.linkedin.com/in/priscilla-araujo-ferreira-090425184
(LinkedIn)

Main Competencies

Technical analysis
Negotiation
Pharmacovigilance

Certifications

3rd Technical Meeting on OPME and High-Cost Medications and Exchange
Pharmacoeconomics and Health Technologies Course
International Congress on Health Auditing

Priscilla Araujo Ferreira

Hospital Supplies Supervisor
São Paulo, São Paulo, Brazil

Summary

I am a pharmacist, with graduate studies in Hospital Administration, with extensive experience in Health Insurance Providers, mainly in the Hospital Supplies area, with negotiation and purchase of High-Cost Medications and OPME (*Orthotics, Prosthetics, and Special Materials*), with a technical vision for better negotiation strategies, aiming to provide lower costs and maintain quality for better service to beneficiaries.

-Projects and negotiations with the pharmaceutical industry seeking lower costs and access to high-cost medications through the incorporation of new technologies.

-Knowledge in the field of regulation and auditing.

-Extensive knowledge in the development, monitoring, and execution of improvement projects, aimed at optimizing workflows and processes.

-Extensive knowledge and experience in implementing actions for quality certifications and processes such as ISO and RN507.

-Experience in leading, training, and guiding teams with collaboration and clear communication among all members to achieve company objectives.

Work Experience

Unimed Nacional

11 years 8 months

Supervisor

October 2023 - Present (2 years 3 months)

São Paulo, Brazil

Pharmacist

May 2014 - Present (11 years 8 months)

São Paulo Region, Brazil

Negotiation of high-cost medications and OPME, aiming for quality and lower costs to benefit both the operator and the beneficiary.

Ensure the availability of oncology medications by meeting specifications and requirements, evaluating market options, and complying with deadlines established by ANS (*National Supplementary Health Agency*) regulations. Validate the drug forms and dosages of requested medications, as well as monitor the pharmacovigilance process and the oral chemotherapy prescriptions submitted to the company.

Development and definition of procedures for supplier qualification according to ANVISA specifications and other key criteria for supplier approval within the company, validation of the defined criteria with suppliers to promote continuous improvement.

Manage the medication importation process when necessary.

Conduct technical research on medications and generics when recommended by medical auditing.

Provide pharmaceutical care to patients by analyzing prescriptions, recommending adjustments or reductions in drug interactions to ensure better patient quality of life.

Analyze and develop workflows and processes within the operator to improve patient service.

Evaluation of providers in collaboration with the Network Provider Qualification Team to assess pharmaceutical care delivered by the accredited network (both consultancy and on-site).

Preparation of medication-related content for CNU dissemination, supporting pharmaceutical care for beneficiaries.

Member of the High-Cost Medication Technical Committee at Unimed Mercosul (a committee formed by Unimed Mercosul to conduct major negotiations with the pharmaceutical industry for the acquisition of high-cost medications, provide technical information on new products, and discuss the current market scenario and benchmarking).

Technical and operational support for the entire medication procurement team within the Unimed Nacional central office.

Unimed Uberaba

OPME Analyst

February 2012 - April 2014 (2 years 3 months)

Uberaba

Negotiation and analysis of budgets and procurement of OPME materials (Orthotics, Prosthetics, and Special Materials) and medications.

Negotiation of pricing tables, support for the internal and external audit teams.

Registration and qualification of OPME and medication suppliers.

Academic Background

Passo 1

Graduate Studies, Hospital Administration · (2012 - 2013)

Uniube - University of Uberaba

Bachelor's Degree in Pharmacy, Industrial Pharmacy · (2004 - 2009)

I, Carolina Favero da Silva, telephone number 415 425-2508, mailing address P.O. Box 90487, San Diego, CA 92169, certify that the professional translation of this document from Portuguese to English has been performed by myself, a qualified translator fluent in both languages, and that the following is an accurate and complete translation of the document.



Date: March 2, 2026.

Contato

www.linkedin.com/in/priscilla-araujo-ferreira-090425184
(LinkedIn)

Principais competências

Análise técnica

Negociação

Farmacovigilância

Certifications

3º Encontro técnico de OPME e Medicamentos de alto Custo e Intercâmbio

Curso de Farmacoeconomia e Tecnologias em Saúde

Congresso Internacional de Auditoria em Saúde

Priscilla Araujo Ferreira

Supervisor-Suprimentos Hospitalares
São Paulo, São Paulo, Brasil

Resumo

Sou uma profissional Farmacêutica pós graduanda em Administração hospitalar, com ampla experiência em Operadoras de Saúde, principalmente na área de Suprimentos Hospitalares com negociação e compra de Medicamentos de Alto Custo e OPME, com visão técnica para melhor estratégia nas negociações, visando proporcionar menor custo e manter a qualidade para melhor atendimento aos beneficiários.

-Projetos e negociações com a indústria farmacêutica buscando menor custo e acesso à medicamentos de alto custo com incorporações de novas tecnologias.

- Conhecimento na área de regulação e auditoria.

-Grande conhecimento no desenvolvimento, acompanhamento e execução de projetos de melhorias, com o objetivo de otimizar fluxos e processos.

-Ampla conhecimento e vivência na implementação de ações para certificações de qualidade e processos como: ISO, e RN507.

-Experiência em liderar, treinar e conduzir equipes com colaboração e comunicação entre todos para atingir os objetivos da empresa.

Experiência

Unimed Nacional

11 anos 8 meses

Supervisor

outubro de 2023 - Present (2 anos 3 meses)

São Paulo, Brasil

Farmacêutica

maio de 2014 - Present (11 anos 8 meses)

São Paulo e Região, Brasil

Negociação de medicamentos de alto custo e OPME, visando qualidade e menor custo beneficiando operadora e beneficiário.

Garantir a disponibilidade dos medicamentos oncológicos, buscando atender especificações e requerimentos, avaliando opções no mercado, atendendo os prazos estabelecidos pelas normas ANS.

Validar a apresentação de drogas e dosagens dos medicamentos solicitados, bem como o acompanhamento do processo de Farmacovigilância e das prescrições médicas de quimioterapia via oral solicitadas a Empresa.

Elaboração e definição de sistemática para qualificação de fornecedores conforme as especificações da Anvisa e demais critérios importantes para homologação de fornecedores junto a empresa, validação dos critérios definidos junto aos fornecedores buscando a melhoria contínua.

Conduzir processo de importação de medicamentos quando necessário.

Realizar pesquisa técnica de medicamentos e similares, quando indicados pela auditoria médica.

Executar assistência farmacêutica aos pacientes, analisando a prescrição, sugerindo adequação ou diminuição das interações medicamentosas para garantia de uma melhor qualidade de vida ao paciente.

Análise e elaboração de fluxos e processos dentro da operadora de solicitações para melhor atendimento ao paciente.

Avaliação de prestadores junto à Equipe de Qualificação de Rede Prestadora para avaliação da assistência farmacêutica realizada pelo rede credenciada. (consultoria e in loco).

Elaboração de conteúdo relacionado à medicamentos para divulgação da CNU colaborando com assistência farmacêutica aos beneficiários.

Membro do Comitê Técnico de Medicamento de Alto Custo da Unimed Mercosul (Comitê formado pela Unimed Mercosul com intuito de realizar grande negociações com a Indústria Farmacêutica para aquisição de medicamentos de alto custo, informações técnicas de novos produtos e debates do cenário atual, benchmarking.).

Apoio técnico e operacional para toda a equipe de compra de medicamentos dentro da central Nacional Unimed.

Unimed Uberaba

Analista OPME

fevereiro de 2012 - abril de 2014 (2 anos 3 meses)

Uberaba

Negociação e análise de orçamentos e compra de materiais de OPME (Órteses, Próteses e Materiais Especiais) e medicamentos.

Negociação de tabelas, apoio à equipe de auditoria interna e externa.

Cadastro e Qualificação de fornecedores de OPME e medicamentos.

Formação acadêmica

Passo 1

Pós Graduação, Administração Hospitalar · (2012 - 2013)

Uniupe - Universidade de Uberaba

Bacharelado em Farmácia, Farmácia Industrial · (2004 - 2009)

02/10/2026

To Whom It May Concern,

My name is Robson Oliveira, and I serve as an Administrative Specialist at Decision, currently performing my activities with Associação Petrobras de Saúde (APS), a supplemental healthcare organization responsible for serving more than 250,000 beneficiaries. I am a senior professional in the areas of supply chain, logistics, and data analysis, with direct involvement in the development, validation, and monitoring of indicators used by management for strategic decision-making. In this context, I worked directly with Antonio de Azevedo Donatti on the implementation project of the EMS Ventura platform for Saúde Petrobras, which began in August 2024.

Throughout this project, I was involved in data analysis activities, dashboard development, report extraction, and the monitoring of operational and financial indicators. Antonio served as the manager responsible for the EMS Ventura projects and products, exercising technical and managerial leadership throughout the solution's implementation. Our professional interaction occurred primarily during the stages of defining indicators, validating data sources, structuring analytical dashboards, and analyzing the results generated by the platform.

Antonio Donatti demonstrated consistent command of OPME authorization, quotation, negotiation, auditing, and proof-of-use workflows, as well as strong capability in structuring technological solutions capable of consolidating operational and financial data for managerial analysis. His expertise lies in transforming complex processes into integrated systems with a strong focus on data governance and decision-support in regulated environments.

The implementation of the platform enabled objective visualization of cost savings achieved by the OPME purchasing area, based on consolidated, traceable, and reliable data. As a direct result of the solution implemented under Antonio's leadership, it was possible to evidence reductions exceeding 35 percent in OPME negotiations, in addition to a significant decrease in manual rework and increased efficiency in the generation of management indicators and reports. These indicators became a permanent part of the area's decision-making routine.

Based on our shared professional experience, I consider that Antonio Donatti's qualifications and contributions have broad applicability, particularly within organizations that operate complex supply chains, regulated environments, and require rigorous cost control. His approach, grounded in process standardization, traceability, and consistent use of reliable data, generates sustainable and measurable impact. I confidently recommend Antonio de Azevedo Donatti and remain available for any additional clarification.

Sincerely,



Robson Oliveira

Administrative Specialist, Decision
Associação Petrobras de Saúde APS
robson.oliveira-decision@saudepetrobras.com.br

Contact

www.linkedin.com/in/robson-oliveira-b16b44245/ (LinkedIn)

Main Competencies

Azure Databricks

Visualization

Python

Certifications

SAP Business One Purchasing

SAP Business One Accounts

YELLOW BELT ADVANCED - 6 SIGMA

Lifelong Learning

Robson Oliveira

Supply Chain & Logistics (Healthcare) | BI (ETL, Power BI) & KPIs | Projects, Processes, OPME & Facilities | SAP ARIBA Key User | Yellow Belt (6 Sigma)

Rio de Janeiro, Rio de Janeiro, Brazil

Summary

Senior Professional in Supply and Logistics with a Focus on Performance and Strategic Results:

With over 12 years of experience in supply, logistics, and data analysis, I develop solutions that integrate operations and corporate strategies. My work encompasses procurement, transportation, planning, purchasing, and reverse logistics, with a focus on operations and transportation.

I am certified in 6 Sigma, having led an OTIF project that transformed operations through continuous improvement methodologies. A specialist in ETL and Power BI, I have solid experience in data extraction and transformation, as well as in creating dashboards and strategic reports to optimize decision-making. Currently, I work in the healthcare sector, managing complex processes, developing reports in SAP, and enhancing performance indicators.

As an administrator and Key User of SAP ARIBA, I manage the SOURCING, CONTRACT, and SLP modules, leading integrations and optimizing processes through performance indicator management. Driven by a continuous pursuit of excellence and innovation, I turn operational challenges into strategic opportunities.

Work Experience

Decision

Administrative analyst specialist

April 2023 - Present (2 years 10 months)

Campinas, São Paulo, Brazil

I am currently responsible for monitoring and developing indicators in Supply, focusing on Purchasing, Direct OPME Purchasing, and Facilities. Additionally, I work as an administrator of SAP Ariba and SAP Business

One systems, as well as designing workflows and processes aimed at continuous improvement.

My commitment is to ensure not only the achievement of company goals but also the implementation of administrative routines and effective solutions, promoting constant improvements, innovation, and alignment with best market practices.

The Roobs

Owner

February 2020 - May 2022 (2 years 4 months)

Francisco Otaviano, 67 - Copacabana

As the owner, I manage the team through hiring and sales training, control cash flow, implementation of a system for inventory control, administration of a fleet of delivery drivers, administrative routines, and all other activities necessary for the smooth operation of both a physical store and an e-commerce business.

Oi

Senior logistics analyst

December 2014 - November 2019 (5 years)

Rio de Janeiro, Brazil

Logistics analyst - Logistics Planning (Aug/18 to Dec/20)

I was responsible for planning, creating, and managing purchase orders for materials such as chips and cards, as well as inventory control. I analyzed operational performance and implemented strategic plans to achieve organizational and financial goals. In this role, I was responsible for data analysis to manage periodic inventory of products in stock through the creation of executive dashboards.

In this area, I implemented the OTIF quality indicator, which measured the quality of inbound receipts, and managed the scheduling team, thus ensuring delivery accuracy, predictability, and compliance with 6SIGMA standards. I constantly developed tools and applications to control, measure, and optimize the entire business chain, execute routines, and compile and record data using industry-specific telecommunications software.

Logistics analyst - Operations Management Specialist (Nov/14 to Jul/18)

I supported the operations management of five distribution centers, conducting, monitoring, and executing daily routines to ensure process compliance, such as requesting accounting reclassifications when necessary,

provisioning unaccounted expenses for the month, and performing monthly expense forecasting to maintain control of fluctuating logistics costs. In this role, I was responsible for producing reports and accounting for productivity projects, contributing to the identification of new opportunities for the team, with a focus on the development and implementation of transportation tracking through end-to-end monitoring.

Accenture Brazil

Mid-Level logistics analyst

July 2012 - December 2014 (2 years 6 months)

Rio de Janeiro, Brazil

I joined the team responsible for order management, distribution, and supply of materials for the telecommunications industry, including handsets, cards, and chips, according to the needs of the contracting company (OI/SA). In this company, I developed tools and applications to control, measure, and optimize the entire chain, as well as conducted daily production follow-up meetings with the team, sharing the status of operations so as to include the situation of shipments, inventory occupancy, and impacts of the area.

Tele Soluções

Junior quality control analyst

April 2007 - November 2011 (4 years 8 months)

Rio de Janeiro, Brazil

I worked as the manager of the service team responsible for auditing and validating established processes, ensuring compliance with industry best practices.

Academic Background

Estácio

Bachelor's Degree in Information Technology · (March 1996 - November 2001)

I, Carolina Favero da Silva, telephone number 415 425-2508, mailing address P.O. Box 90487, San Diego, CA 92169, certify that the professional translation of this document from Portuguese to English has been performed by myself, a qualified translator fluent in both languages, and that the following is an accurate and complete translation of the document.



Date: March 2, 2026.

Contato

www.linkedin.com/in/robson-oliveira-b16b44245 (LinkedIn)

Principais competências

Azure Databricks

Visualização

Python

Certifications

SAP Business One Compras

SAP Business One Contas

YELLOW BELT ADVANCED - 6 SIGMA

Lifelong Learning

Robson Oliveira

Supply Chain & Logística (Saúde) | BI (ETL, Power BI) & KPIs | Projetos, Processos, OPME & Facilities | SAP ARIBA Key User | Yellow Belt (6 Sigma)

Rio de Janeiro, Rio de Janeiro, Brasil

Resumo

Profissional Sênior em Suprimentos e Logística com Foco em Performance e Resultados Estratégicos:

Com mais de 12 anos de experiência em suprimentos, logística e análise de dados, desenvolvo soluções que integram operações e estratégias corporativas. Minha atuação abrange abastecimento, transporte, planejamento, compras e logística reversa, com destaque para operações e transporte.

Sou certificado em 6 Sigma, liderando projeto OTIF que transformou operações por meio de metodologias de melhoria contínua.

Especialista em ETL e Power BI, tenho sólida experiência na extração e transformação de dados, além de criar dashboards e relatórios estratégicos para otimizar a tomada de decisões.

Atualmente, atuo no segmento de saúde, gerenciando processos complexos, desenvolvendo relatórios no SAP e aprimorando indicadores de desempenho.

Como administrador e Key User do SAP ARIBA, gerencio os módulos SOURCING, CONTRACT e SLP, liderando integrações e otimizando processos por meio da gestão de indicadores.

Motivado pela busca contínua por excelência e inovação, transformo desafios operacionais em oportunidades estratégicas.

Experiência

Decision

Analista administrativo especialista

abril de 2023 - Present (2 anos 10 meses)

Campinas, São Paulo, Brasil

Atualmente sou responsável pelo controle e desenvolvimento de indicadores em Suprimentos, com foco nas áreas de Compras, Compras Diretas de OPME e Facilities Além disso, atuo como administrador dos sistemas SAP Ariba e

SAP Business One, como também desenho de fluxos e processos, visando a melhoria contínua.

Meu compromisso é garantir não apenas o alcance das metas da empresa, mas também implementar rotinas administrativas e soluções eficazes promovendo melhorias constantes, inovando e alinhadas com as melhores práticas do mercado.

The Roobs

Proprietário

fevereiro de 2020 - maio de 2022 (2 anos 4 meses)

Francisco Otaviano, 67 - Copacabana

Como proprietário atuo na gestão de equipe através de contratação e treinamento de vendas, controle de fluxo de caixa, implementação de sistema para controle de estoque, administração de frota de motoboys, rotinas administrativas e todas as demais atividades necessárias para o bom andamento de um negócio físico e e-commerce.

Oi

Analista de logística sênior

dezembro de 2014 - novembro de 2019 (5 anos)

Rio de Janeiro, Brasil

Analista de logística – Planejamento Logístico (ago/18 a dez/20)

Fui responsável pelo planejamento, criação e gestão de pedidos de compras de materiais como chips e cartões e pelo controle de estoque. Analisei o desempenho operacional e implementei planos estratégicos a fim de cumprir as metas organizacionais e financeiras. Nessa área, fui responsável pela análise de dados para controle de inventário periódico dos produtos em estoque através da construção de dashboards executivos.

Nessa área implementei o indicador de qualidade OTIF, que aferi a qualidade dos recebimentos inbound, e gestão da célula de agendamento, garantindo assim a assertividade de entrega, previsibilidade e conformidade com regras 6SIGMAS. Constantemente desenvolvi ferramentas e aplicativos com o objetivo de controlar, aferir e otimizar toda a cadeia de negócio, execução de rotinas e compilação e registro de dados utilizando softwares específicos da indústria de telecomunicação.

Analista de logística – Especialista em Gestão de operações (nov/14 a jul/18)

Atuei no suporte da gestão de operações de 5 centros de distribuição conduzindo, acompanhando e executando rotinas diárias de forma a garantir a conformidade nos processos como solicitação de reclassificações contábeis

quando necessário, provisionando despesas não-contabilizadas no mês e realizando a previsão mensal de gastos, de forma a garantir o controle dos custos logísticos flutuantes. Nessa área, fui responsável pela produção de relatórios e prestação de contas dos projetos de produtividade, colaborando para a identificação de novas oportunidades para a equipe, com destaque para o desenvolvimento e implantação do tracking de transporte através do monitoramento ponta a ponta.

Accenture Brasil

Analista de logística pleno

julho de 2012 - dezembro de 2014 (2 anos 6 meses)

Rio de Janeiro, Brasil

Integrei a equipe de gestão de pedidos, distribuição e abastecimento de materiais para a indústria de telecomunicação como handsets, cartões e chips conforme a necessidade da empresa contratante (OI/SA). Nessa empresa, desenvolvi ferramentas e aplicativos a fim de controlar, aferir e otimizar toda a cadeia, como também a conduzi reuniões diárias de acompanhamento da produção com a equipe, compartilhando o status das operações de forma a incluir a situação dos carregamentos, ocupação do estoque e impactos da área.

Tele Soluções

Analista de controle de qualidade jr.

abril de 2007 - novembro de 2011 (4 anos 8 meses)

Rio de Janeiro, Brasil

Atuei como gestor da equipe de atendimento responsável pela auditoria e validação de processos estabelecidos, a fim de garantir a conformidade dos processos de acordo com boas práticas do mercado.

Formação acadêmica

Estácio

Tecnologia da Informação · (março de 1996 - novembro de 2001)

**Exhibit C.II - Second
Prong: Financial
Feasibility and
Personal Asset
Evidence**

Since this is a Market Appraisal Report based on information obtained from the real estate market, considering properties with similar characteristics and socio-economic location, a possible variation of up to 5% (five percent) in the value stated above should be expected, either higher or lower (-5% to +5%), due to the inherent interests of the market and the property owner. Thus, the estimated range is: R\$ 714,456.89 (seven hundred fourteen thousand, four hundred fifty-six reais and eighty-nine cents) as the minimum, and R\$ 789,662.87 (seven hundred eighty-nine thousand, six hundred sixty-two reais and eighty-seven cents) as the maximum, reflecting the confidence interval of the market research conducted.



Signature: SÔNIA ELISETE RAMPAZZO

CRECISC (Regional Council of Real Estate Brokers of Santa Catarina) 55.659



Cover Letter for Market Appraisal Report

Florianópolis, December 22, 2025

To Mr. Antonio Donatti

Ref.: Submission of Market Appraisal Report

Dear Sir,

I hereby present, based on COFECI (*Federal Council of Real Estate Brokers*) Resolution No. 1066/07 and COFECI Normative Act No. 001/11, the results of the real estate appraisal of the property located at Rua Tenente Silveira, No. 600, Florianópolis/Santa Catarina, ZIP Code 88010-301, as detailed in Market Appraisal Report - SER No. 001/2025, comprising 32 pages.

This appraisal report was prepared taking into account the conditions of the aforementioned property, observed during the inspection, and applying the direct comparison method of market data, based on a survey of properties with comparable characteristics and attributes, according to transactions in the regional real estate market.

Thank you for your trust. I take this opportunity to express my highest consideration and remain at your disposal for any clarifications that may be necessary.

Sincerely,


Sônia Elisete Rampazzo
Real Estate Broker
CRECISC No. 55.659

Acknowledged by:

Name: _____

ID: _____

Date: ____/____/____

Signature: _____

MARKET APPRAISAL REPORT

In accordance with Law No. 6530/78, COFECI Resolution No. 1066/07, and COFECI Normative Act No. 001/11.

Property Appraised:	Rua Tenente Silveira, 600
Purpose of the Appraisal:	Determination of the Fair Market Value
Interested Party:	Mr. Antonio De Azevedo Donatti Sônia Elisete Rampazzo CRECI 55.659/SC
Date:	12/22/2025



View of the Appraised Property

SUMMARY

1. REQUESTER	3
2. PURPOSE	3
3. COMPETENCE	3
4. ABNT/NBR PARTS	4
5. ABBREVIATIONS	4
6. APPRAISED PROPERTY	5
7. INSPECTION	5
8. PROPERTY DESCRIPTION:	5
8.1. PHOTOGRAPHIC RECORD OF THE APPRAISED PROPERTY	9
9. REGIONAL CHARACTERISTICS	12
10. BOUNDARIES	12
11. LOCATION MAP	13
12. AERIAL VIEW	13
13. METHODOLOGY USED	13
14. MARKET RESEARCH – REFERENCE PROPERTIES	14
14.1. R1 – REFERENCE PROPERTY 1	14
14.2. R2 – REFERENCE PROPERTY 2	15
14.3. R3 – REFERENCE PROPERTY 3	15
14.4. R4 – REFERENCE PROPERTY 4	16
15. ADJUSTMENTS AND VALUE STANDARDIZATION	16
15.1. REGARDING LISTING PRICES	16
15.2. REGARDING PROPERTY AGE	18
15.3. OBTAINED RESULT	19
16. NOTES	20
17. CONCLUSION	20
18. APPENDICES	22
18.1. RESUME OF THE REAL ESTATE BROKER ISSUING THIS APPRAISAL	22
18.2. PROPERTY USEFUL LIFE TABLE	23
18.3. PROPERTY CONDITION TABLE	24
18.4. ROSS-HEIDECHE TABLE	25
18.5. PROPERTY REGISTRATION AND IPTU GUIDE	26

1. REQUESTER

Mr. Antonio De Azevedo Donatti, registered with CPF No. 061.603.489-06, residing at Rua Tenente Silveira, No. 600, Apartment No. 707, Florianópolis / Santa Catarina, ZIP Code 88010-301.

2. PURPOSE OF THE MARKET APPRAISAL REPORT (PTAM)

This Appraisal Report aims to determine the market value for SALE of the apartment located at Rua Tenente Silveira, 600, Centro neighborhood, ZIP Code 88010-301, owned by Antonio De Azevedo Donatti, registered with CPF No. 061.603.489-06, the property being described in accordance with Registration No. 11,037 of the 1st Real Estate Registry Office of Florianópolis, and duly registered with the City Hall of the Municipality of Florianópolis as a municipal taxpayer under PMF No. 52.14.089.0498.046.811.

3. COMPETENCE

This appraisal is in accordance with Law No. 6,530 of May 12, 1978 (Federal Official Gazette of 05/15/1978), which regulates the profession of Real Estate Broker, in compliance with the provisions of Article 3, which states that ***"It is the responsibility of the Real Estate Broker to mediate the purchase, sale, exchange, and lease of properties, and to provide opinions regarding real estate commercialization"***.

In addition, the preparation of this appraisal complies with COFECI - Federal Council of Real Estate Brokers Resolution No. 1,066 of November 22, 2007 (Federal Official Gazette of 11/29/2007), which establishes new regulations for the preparation of a Market Appraisal Report, in accordance with Article 4, which states: **"A Market Appraisal Report - PTAM - is understood as the document prepared by a Real Estate Broker in which, based on technical criteria, a market analysis is presented with a view to determining the commercialization value of a property, either judicially or extrajudicially"** and the subsequent articles outline the requirements for a PTAM, highlighting Article 6, which states: **"The preparation of a Market Appraisal Report is permitted to any Real Estate Broker, as an individual, duly registered with a Regional Council of Real Estate Brokers"**.

4. ABNT/NBR PARTS

ABNT/NBR (*Brazilian Association of Technical Standards / Brazilian Regulatory Standard*) 14.653 consists of the following parts, under the general title "Asset Appraisals".

Part 1: General procedures;

Part 2: Urban properties;

Part 3: Rural properties;

Part 4: Developments;

Part 5: Machinery, equipment, and industrial assets in general;

Part 6: Natural and environmental resources;

Part 7: Historical heritage.

NBR 14.653-1 serves as a guide, indicating the general procedures for the other parts and, following the guidelines of COFECI Resolution 1,066/07, was taken into consideration together with NBR 14.653-2, NBR 14.653-3, and NBR 14.653-4.

5. ABBREVIATIONS

A.T.T - Total Land Area

A.T.C - Total Built Area

AC - Apparent Age of the Construction

ABNT - Brazilian Association of Technical Standards. Art. - Article

AT - Land Area

C.M² - Cost per Square Meter

CNAI - National Registry of Real Estate Appraisers

CRECISC - Regional Council of Real Estate Brokers of Santa Catarina

DTC - Depreciation by Construction Time

IA - Appraised Property

IPTU - Urban Property Tax

M² - Square Meter

MG - General Average

NBR - Brazilian Standards

PTAM - Market Appraisal Report

Rs - Reference Properties

R.F.D - Depreciation Factor Result

TG - Total Overall

V.G.V or V.G.L - Total Sale or Lease Value

V.L - Lease Value

V.M - Average Value

V.V - Fair Market Value

6. APPRAISED PROPERTY

The appraised property subject to this PTAM, owned by Antonio de Azevedo Donatti, is located at Rua Tenente Silveira, 600, Registration No. 11,037 of the 1st Real Estate Registry Office of Florianópolis, as follows:

"1st) apartment number 707, located on the 7th floor of the Gov. Ivo Silveira Residential Building, situated at Rua Tenente Silveira, number 600, Centro, in this Capital, with a private usable area of 61.96 m², shared common area of 9.041 m², totaling 71.00 m² of total usable area, occupying 1.1962% of the ideal fraction of the land with a total area of 753.90 m²; registered with the PMF under No. 52.14.089.0498.046.811, with the respective acquisition title duly recorded in the 1st Real Estate Registry Office of this Judicial District, Book 2/RG, page 01, under No. 11,037.

7. INSPECTION

The property was inspected on site by the undersigned on 12/17/2025, in the morning. During the inspection, the building's measurements were verified, its age assessed, and the state of conservation, damages, improvements, and quality of construction materials were analyzed.

8. PROPERTY DESCRIPTION

Apartment on a high floor, with sunlight in all rooms providing excellent lighting and ventilation, with 61.96 m² of private area, featuring two (02) bedrooms, including 1 suite, two (02) bathrooms,

one with natural ventilation and the other with forced ventilation, kitchen integrated with the living room and hall, excellent solar orientation, and a service area.

The property features built-in custom furniture in the living room, kitchen, suite, bathrooms, and service area.

The condominium has a single tower of twelve (12) floors, with eight (08) apartments per floor (only 4 on the first floor and 5 on the twelfth floor, totaling 89 units), two (02) elevators, an internal garden for socializing, and a front security booth.

The building was constructed in 1979 but underwent façade restorations and a retrofit between 2015 and 2017.

The condominium has a security system at the entrance, requiring a tag or fingerprint access.

Nearby streets offer schools, universities, supermarkets, bakeries, pharmacies, local shops, cafés, and squares.

The following tables present the characteristics describing the appraised property.

About the Land

Frontage	15 m
Cardinal orientation	East
Length	50 m
Topography	Sloped
Position	End of the block

About the Building

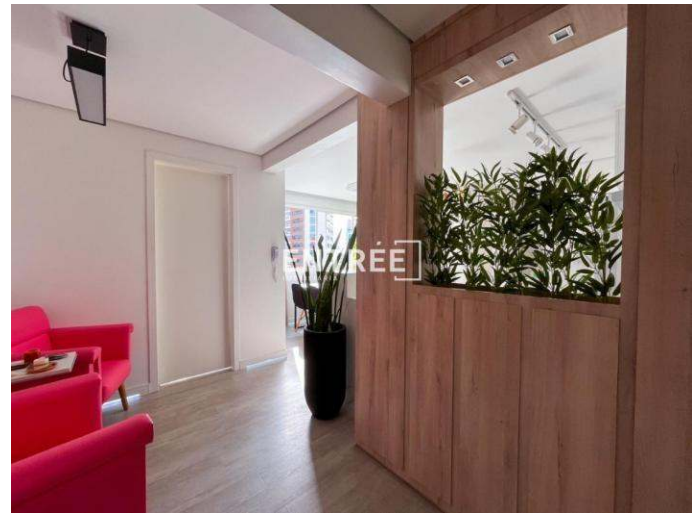
Street Grade	Above street level
Number of towers/blocks	1
Number of floors	12
Number of units	89
Number of basement levels	1
Age	46 years
Apparent age	35 years
General condition	Average
Exterior finish	Masonry
Door frames	Tempered glass
Window frames	Aluminum
Number of passenger elevators	1
Number of service elevators	1
Main pedestrian entrance	1
Service entrance	0
Vehicle entrance	2
Visitor entrance	0
Service vehicle entrance	0
Concierge	1
Intercom system	Yes
Swimming pool	None
Party room	None
Game room	None
Cinema room	None
Sports court	None
Steam sauna	None
Dry sauna	None
Garden	1
Barbecue area	None
Internet room	None
Meeting/training room	None
Auditorium	None
Jogging track	None
Bicycle rack/parking area	1
Individual water meter	None

Regarding the appraised unit

Orientation of main windows	North / Northwest
-----------------------------	-------------------

Room	Description	Flooring	Walls	Wall Finish	Ceiling
Entrance hall	Armchairs and MDF panel	Vinyl	Masonry and Wood	Textured finish	Plaster finish
Master suite	Custom-built cabinets	Vinyl	Masonry	Paint in excellent condition	Plaster finish
En-suite bathroom	Custom-built cabinet and tempered glass shower enclosure	Vinyl and porcelain tile	Porcelain tile	Porcelain tile	Plaster finish
Living room / TV room	Custom-built cabinets with plaster ceiling finish and direct and indirect lighting	Vinyl	Masonry	Paint in excellent condition and wall panel	Plaster finish with indirect lighting
Kitchen	Open-plan kitchen integrated with the living room, featuring custom-built cabinets and a Calacatta quartz countertop for dining	Vinyl	Masonry / Wood and Porcelain tile	Custom-built cabinetry	Masonry
Laundry area	Custom-built cabinets, washing machine, laundry sink, and granite countertop	Vinyl	Masonry	Masonry	Plaster finish
Guest bathroom	Custom-built cabinet and tempered glass shower enclosure	Vinyl and porcelain tile	Porcelain tile	Porcelain tile	Plaster finish

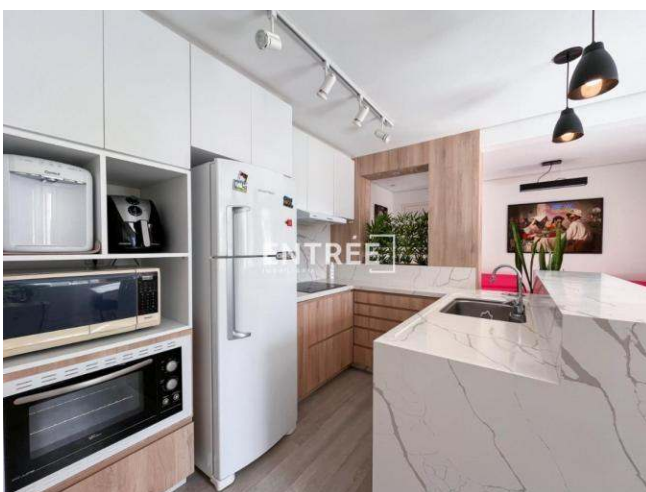
8.1 Photographic Record of the Appraised Property



Apartment Hall



Kitchen / Living Room / Hall



Open-Plan Kitchen and Living Room



Living Room



Bedroom - Suite



En-suite Bathroom / Guest Bathroom



Laundry Area



Building Hall



Building Façade

9. LOCATION AND REGIONAL CHARACTERISTICS

The appraised property is located at Rua Tenente Silveira 600, on a block bounded by Rua Felipe Schmidt, Rua Esteves Junior, and Avenida Rio Branco, in an area exhibiting the characteristics described in the following table.

About the Region
Zoning: ARM 12.5 - Mixed Residential Area
Nearest Main Avenue: Avenida Rio Branco

Value-Adding elements in the vicinity (within a 1 km radius)

4 Shopping Centers
3 Public Squares
Several bus stops
4 Bakeries
8 Cafés
3 Supermarkets
2 Post offices
4 Restaurants
6 Primary and secondary schools
3 Universities
3 Pharmacies
4 Branches of major national banks

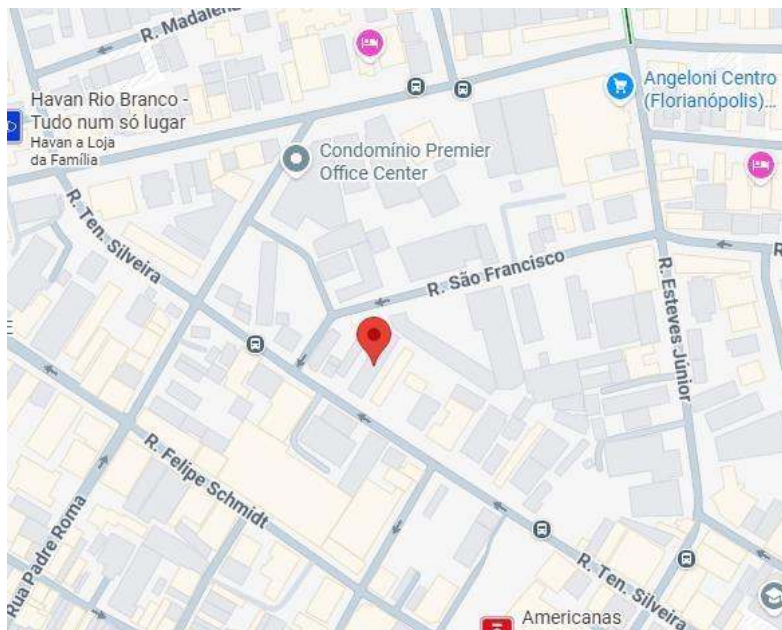
Infrastructure and public services

Paved street
Gas network
Telephone network
Electricity network
Cable TV network
Internet network
Water and sewage network

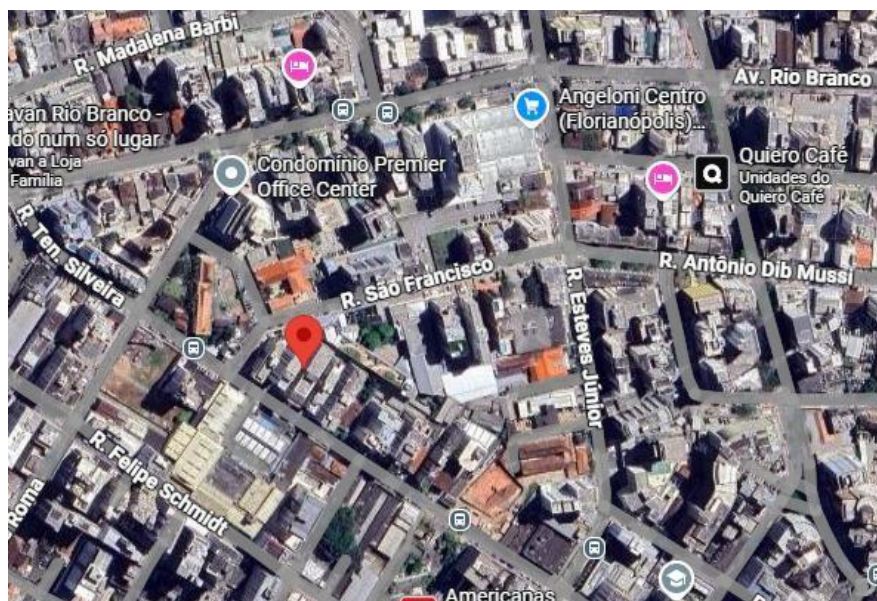
10. BOUNDARIES

The exact description and boundaries of the property are detailed in Registration No. **11,037** at the 1st Real Estate Registry Office of the Municipality of Florianópolis and form an integral part of this Appraisal Report. Any possible changes will be recorded in the annotations of that document.

11. LOCATION MAP



12. AERIAL VIEW



13. METHODOLOGY USED

In accordance with COFECI Resolution 1,066/07, Annex IV of Normative Act 001/2011 from COFECI, and considering item 8.2.1 of ABNT/NBR 14.653, the “Direct Comparison Method of Market Data” was used for the preparation of this Market Appraisal Report and the appraisal of the property subject to this appraisal.

Using the applied method, the various trends and fluctuations of the real estate market were taken into account, identifying properties with comparable attributes, referred to as

reference properties, to compare with the appraised property. Based on the weighting of the data obtained, it was possible to determine the value of the property.

It is in this context that this method proves to be the most recommended and widely used for property value appraisal.

14. MARKET RESEARCH - REFERENCE PROPERTIES (Rs)

The determination of the value of the appraised property was carried out by comparing it in the market with four (4) other properties that have elements with comparable attributes. These properties, serving as reference properties, were used in the method applied in this appraisal report.

14.1 R1 - Reference Property 1

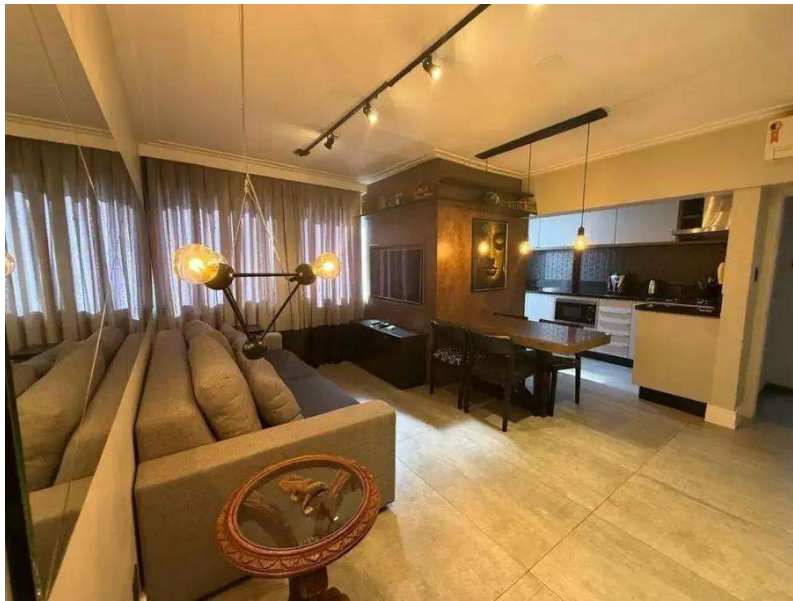


R\$ 760,000.00 - 57 m² - 35 years

Property listed for sale through EL - Luiz Athoff Solução em Imóveis

[Apartment with 2 bedrooms and a party room, 57 m², in Centro, Florianópolis - ZAP Imóveis](#)

14.2 R2 - Reference Property 2



R\$ 850,000 - 61 m² - 35 years

Property listed for sale through Imobiliária Gralha

[2-Bedroom apartment on Rua Tenente Silveira, --, Centro, Florianópolis - SC, ID: 35256023](#)

14.3 R3 - Reference Property 3



R\$ 790,000 - 62 m² - 36 years

Property listed for sale through Auxiliadora Predial

[2-Bedroom apartment with elevator, 62 m², Centro, Florianópolis - ZAP Imóveis](#)

14.4 R4 - Reference Property 4



R\$ 569,000 - 50 m² - 33 years

Property listed for sale through MARB Imóveis

[2-Bedroom furnished apartment, 50 m², Centro, Florianópolis - ZAP Imóveis](#)

15 ADJUSTMENTS AND VALUES STANDARDIZATION

Despite the similarity of the reference properties to the appraised property, it was necessary to apply adjustment calculations to achieve comparable and standardized values for an accurate valuation. The following section describes the calculations applied.

15.1 Regarding listing prices

For reference properties whose source of information was a market listing, it is understood that the listed prices are typically higher than the actual market value of the property. Therefore, it is necessary to apply a reduction factor to adjust them to their true market value.

According to ABNT/NBR 14.653-2, item 8.2.1.3.4 (which states that “*Listing data are important indicators of market value. However, overestimations that generally accompany these prices should be considered, and, whenever possible, quantified by comparison with transaction data*”), the following table applies a 5% (five percent) reduction factor to the listed price of each property under the conditions described above.

The calculation of the aforementioned reduction factor was performed using the following formula:

$$\text{market value} = \text{listed price} - \frac{\text{listed price} \times 5}{100}$$

In the table below, the column “Negotiation Reduction Factor” shows the amount to be subtracted from the listed price, corresponding to 5% (five percent) of that price; and the

column to the right, “Market Value per m²”, presents the adjusted value of each reference property, already divided by its floor area as indicated in the “Built Area (m²)” column.

REFERENCE PROPERTY DATA

						5%	
	Address	Built Area (m ²)	Source of Information	Listing Price	Property Age	Negotiation Reduction Factor	Market Value per m ²
R1	Rua Tenente Silveira	57	Market Listing	R\$760,000.00	35	38,000.00	R\$12,666.66
R2	Rua Tenente Silveira	61	Market Listing	R\$850,000.00 (-100k Market Correction)	35	37,500.00	R\$11,680.33
R3	Rua Tenente Silveira	62	Market Listing	R\$790,000.00	36	39,500.00	R\$12,104.84
R4	Rua Tenente Silveira	50	Market Listing	R\$569,000.00	33	28,450.00	R\$10,811.00

15.2 Regarding property age

The ages of the reference properties are not the same as that of the appraised property, thus presenting differences regarding the percentage of useful life of each asset, which makes it necessary to homogenize the values to represent a compatible reality, in order to obtain comparable samples for the determination of the value in conclusion of this appraisal report.

Reference properties that are newer than the appraised property will be depreciated, and reference properties that are older than the appraised property will have their values increased (appreciated), in both cases, the appropriate age proportion will be applied to determine the value these reference properties would have if they had the same age and condition as the appraised property.

The calculation base will be obtained using the following formulas, which utilize the Ross-Heidecke table included in the appendices of this appraisal report.

$$\text{Depreciated Value} = \text{Property Value} - \left(\frac{\text{Property value} \times \text{Ross-Heidecke factor}}{100} \right)$$

$$\text{Appreciated Value} = \frac{\frac{\text{Property value}}{(100 - \text{Ross-Heidecke factor})}}{100}$$

The age difference between the reference properties and the appraised property was calculated, taking into account that these properties have an assumed useful life of 70 years for the determination of the percentage of the property's useful life, using the following formula:

$$\text{Percentage of useful life} = \frac{\text{Property age}}{\text{Useful life}} \times 100$$

The table shows the age of the Appraised Property (AP), which was used in applying the formula described above for the calculations performed.

The last column on the right of the table presents the value per square meter (m²) of each reference property, with all adjustments described so far already applied; and the bottom row of the table shows the arithmetic average of these values.

DATA OF THE APPRAISED PROPERTY (AP)

Construction area (m²): 61.96

Age of the Appraised Property: 46

STANDARDIZATION DATA OF REFERENCE PROPERTIES

	Age difference between the AP and the RP 14/70	Useful life of the property	Percentage of Useful Life of the Property (in %)	State of Conservation		Column in the Ross-Heidecke Table	Index in the Ross-Heidecke Table	Homogenized Sale Price per m²
R1	11	70	50.00	Between minor and major repairs	F	6	58.20	R\$ 11,822.22
R2	11	70	50.00	Between minor and major repairs	F	6	58.20	R\$ 10,903.65
R3	10	70	51.43	Between minor and major repairs	F	6	59.60	R\$ 11,396.78
R4	13	70	47.14	Between minor and major repairs	F	6	56.90	R\$ 10,014.90
Total:								R\$ 44,137.55
Average adjusted and homogenized price per m²:								R\$ 11,034.39

15.3 Obtained Result

In accordance with the principles, definitions, and procedures established by **NBR 14.653 - Asset Appraisal**, issued by the Brazilian Association of Technical Standards - ABNT, especially regarding the requirement for proper identification of the state of conservation, construction standard, and usage conditions of the appraised property, it is noted that the present property has undergone a recent full renovation, encompassing:

- complete replacement of electrical and plumbing systems;
- upgrading of wall coverings, flooring, and finishes;
- installation of higher-standard cabinetry and equipment;
- modernization of interior spaces and functional improvements;
- extension of the economic useful life and enhancement of market liquidity.

Under the terms of NBR 14.653, the standardization and treatment of samples must consider the factors that influence value formation, including construction standard and state of conservation. Accordingly, it is technically appropriate to apply an appreciation factor to the average homogenized value per square meter, in order to reflect the property's actual quality level and its updated condition.

It is therefore proposed to adopt an appreciation **factor ranging from 8% to 10%**, a percentage consistent with market practices and supported by the economic impact of the improvements carried out.

With the application of the aforementioned factor, the following result is obtained:

- adjusted value per m²: between **R\$ 11,917.14** and **R\$ 12,137.83**;
- final adjusted value of the property: between **R\$ 738,386.07** and **R\$ 752,059.88**.

Therefore, the values presented meet the technical criteria and current standards, representing a fair, proportional and reasoned estimate, adequately reflecting the specific characteristics of the property evaluated.

16 NOTES

Various factors can influence the determination of a property's market value, including land slope, depreciating characteristics such as flood-prone areas, wiring, the presence of street markets in front, among many others, as well as factors that can increase the property's value due to its surroundings, desirable public improvements, and natural features. However, in the appraisal of the property subject to this appraisal report, the aforementioned possible influences were not considered, since the reference properties obtained are located in the vicinity of the appraised property.

Therefore, all the properties referred to in this appraisal report, both the reference properties and the appraised property, share the same proximity to value-enhancing and value-reducing public characteristics, making it mathematically unnecessary to consider them specifically for this case.

17 CONCLUSION

Based on research of properties with comparable elements and characteristics, and through the technical treatment and weighting of their attributes, using the Direct Comparison Method of Market Data and applying the appropriate homogenization techniques that allow the determination of value while considering the various trends and specific fluctuations of the real estate market, irrespective of other sectors of the economy, it is concluded that the Market Value of the property subject to this Market Appraisal Report is **R\$ 752,059.88** (seven hundred fifty-two thousand, fifty-nine reais and eighty-eight cents).

VALUE OF THE APPRAISED PROPERTY: R\$ 752,059.88

(seven hundred fifty-two thousand, fifty-nine reais and eighty-eight cents).

As this is a commercial Market Appraisal Report based on information obtained from the real estate market, considering properties with similar characteristics and socio-economic location, a possible variation of up to 5% (five percent) above or below the value stated should be anticipated (-5% to +5%), given the inherent interests of the market and the property owner. Thus, the range is R\$ 714,456.89 (seven hundred fourteen thousand, four hundred fifty-six reais and eighty-nine cents) as the minimum, and R\$ 789,662.87 (seven hundred eighty-nine thousand, six hundred sixty-two reais and eighty-seven cents) as the maximum, due to the confidence interval margin of the conducted research.



Signature: SÔNIA ELISETE RAMPAZZO
CRECISC 55.659

18 APPENDICES

18.1 Resume of the Real Estate Broker issuing this Appraisal Report

Personal Information

18.1.1 Name: Sônia Elisete Rampazzo

18.1.2 Date of Birth: 04/26/1964

18.1.3 Place of Birth: Erechim/Rio Grande do Sul

18.1.4 Qualification: Real Estate Broker

18.1.5 CRECISC: 55.659 - 11th Region (Santa Catarina)

18.1.6 Address: Rua Cristóvão Nunes Pires, 150 - Apartment 404. Centro - Florianópolis/SC.

18.1.7 CPF: 411.313.550-91

18.1.8 Phone: (48) 99618.1473

18.1.9 Email: sonia.rampazzo@creci.org.br

Academic Background

- Bachelor's Degree: Biology
- Master's Degree: Regional Development
- Doctorate: Ecology - Environmental Planning

Professional Skills

18.1.10 Experience in the real estate sector as a Real Estate Broker since 2023;

18.1.11 Condominium Manager in a residential building for 9 years (2014 - 2022).

Signature:



Sônia Elisete Rampazzo

18.2 Property Useful Life Table

List of Property Useful Lives (Bureau of Internal Revenue)			
PROPERTY TYPE	TYPE	STANDARD	USEFUL LIFE (in years)
RESIDENTIAL	SHACK	RUSTIC	5
		SIMPLE	10
	HOUSE	WOODEN	45
		RUSTIC	60
		ECONOMIC, SIMPLE or MEDIUM	70
		FINE or LUXURY	60
	APARTMENT	ECONOMIC, SIMPLE or MEDIUM	70
		FINE or LUXURY	60
COMMERCIAL	OFFICE	ECONOMIC or SIMPLE	70
		MEDIUM	60
		FINE or LUXURY	50
	STORE		70
INDUSTRIAL	WAREHOUSE		75
	SHED	RUSTIC or SIMPLE	60
		MEDIUM	80
		SUPERIOR	80
	PENTHOUSE	RUSTIC or SIMPLE	20
		SUPERIOR	30
FACTORY		50	
RURAL	SILO		75
	OTHER RURAL CONSTRUCTIONS		60
BANK			70
HOTEL			50
THEATER			50

18.3 Property Condition Table

This table is used to identify the factors from the Ross-Heidecke Table that will be applied in the formulas used in this appraisal report.

Property Condition Classification Table

CLASSIFICATION	CODE
New	A
Between new and fair	B
Fair	C
Between fair and minor repairs	D
Minor repairs	E
Between minor and major repairs	F
Major repairs	G
Between major repairs and no value	H
No Value	I

18.4 Ross-Heidecke table

Ross-Heidecke Table for Property Depreciation								
AGE AS % OF USEFUL LIFE	CONDITION OF CONSERVATION							
	A	B	C	D	E	F	G	H
2	1.02	1,05	3.51	9.03	18.90	39.30	53,10	75.40
4	2.08	2.11	4.55	10.00	19.80	34.60	53.60	75.70
6	3.18	3.21	5.62	11.00	20,70	35.30	54.10	76.00
8	4,32	4.35	6.73	12.10	21.60	36.10	54.60	76.30
10	5.50	5.53	7.88	13.20	22.60	36.90	55.20	76.60
12	6.72	6.75	9.07	14.30	23.60	37,70	55.80	76.90
14	7.98	8.01	10.30	15.40	24.60	38.50	56.40	77.20
16	9.28	9.31	11.60	16.60	25.70	39.40	57.00	77.50
18	10.60	10.60	12.90	17.80	26.80	40.30	57.60	77.80
20	12.00	12.00	14.20	19.10	27.90	41.80	58.30	78.20
22	13.40	13.40	15.60	20.40	29.10	42.20	59.00	78.50
24	14.90	14.90	17.00	21.80	30.30	43.10	59.60	78.90
26	16.40	16.40	18.50	23.10	31.50	44.10	60.40	79.30
28	17.90	17.90	20.00	24.60	32.80	45.20	61.10	79.60
30	19.50	19.50	21.50	26.00	34.10	46,20	61.80	80.00
32	21.10	21.10	23.10	27.50	35.40	47,30	62.60	80.40
34	22.80	22.80	24.70	29.00	36.80	48.40	63.40	80.80
36	24.50	24.50	26.40	30.50	38.10	49.50	64.20	81.30
38	26.20	26.20	28,10	32.20	39.60	50.70	65.00	81.70
40	28,80	28,80	29.90	33.80	41.00	51.90	65.90	82.10
42	29.90	29,80	31.60	35.50	42.50	53,10	66.70	82,60
44	31.70	31.70	33.40	37.20	44.00	54,40	67.60	83.10
46	33.60	33.60	35.20	38.90	45,60	55.60	68.50	83.50
48	35,60	35.50	37.10	40.70	47.20	56.90	69.40	84.00
50	37.50	37.50	39.10	42.60	48.80	58.20	70.40	84.50
52	39.50	39.50	41.90	44.00	50.50	59.60	71.30	85.00
54	41.60	41.60	43.00	46.30	52.10	61.00	72.30	85.50
56	43.70	43.70	45.10	48.20	53.90	62.40	73.30	86.00
58	45,80	45,80	47.20	50.20	55.60	63.80	74,30	86.60
60	48.80	48.80	49.30	52.20	57.40	65.30	75.30	87.10
62	50.20	50.20	51.50	54.20	59.20	66.70	75.40	87.70
64	52.50	52.50	53.70	56.30	61.10	68.30	77.50	88.20
66	54.80	54.80	55.90	58.40	69.00	69.80	78.60	88.80
68	57.10	57.10	58.20	60.60	64,90	71.40	79.70	89.40
70	59.50	59.50	60.50	62.80	66.80	72.90	80.80	90,40
72	62.20	62.20	62,90	65.00	68.80	74.60	81,90	90.90
74	64.40	64.40	65.30	67.30	70.80	76.20	83.10	91.20
76	66.90	66.90	67.70	69.60	72.90	77.90	84.30	91.80
78	69.40	69.40	72.20	71.90	74.90	89.60	85.50	92.40
80	72.00	72.00	72.70	74,30	77.10	81.30	86.70	93.10
82	74.60	74.60	75.30	76,70	79.20	83.00	88.00	93.70
84	77.30	77.30	77.80	79.10	81.40	84.50	89.20	94.40
86	80.00	80.00	80.50	81.60	83.60	86.60	90.50	95.00
88	82.70	82.70	83.20	84.10	15.83	88.50	91.80	95,70
90	85.50	85.50	85.90	86.70	88.10	90.30	93.10	96.40
92	88.30	88.30	88.60	89.30	90,40	92.20	94.50	97.10
94	91.20	91.20	91.40	91.90	92,80	94.10	95.80	97.80
96	94.10	94.10	94,20	94.60	95.10	96.00	97.20	98.50
98	97.00	97.00	97.10	97.30	97.60	98.00	98.00	99.80
100	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00

I, Carolina Favero da Silva, telephone number 415 425-2508, mailing address P.O. Box 90487, San Diego, CA 92169, certify that the professional translation of this document from Portuguese to English has been performed by myself, a qualified translator fluent in both languages, and that the following is an accurate and complete translation of the document.



Date: March 2, 2026.

Por tratar-se de um Parecer Técnico de Avaliação Mercadológica expedida comercial que se louna em informações obtidas junto ao mercado imobiliário, considerando imóveis com características e localização sócia econômica semelhante, deve-se prever uma possível variação de até 5% (cinco por cento) no valor acima expresso, para mais ou para menos, (-5% a + 5%), diante dos interesses inerentes do próprio mercado e de seu proprietário. Então, temos, 714.456,89 (setecentos e quatorze mil, quatrocentos e cinquenta e seis reais, noventa e nove centavos) e o máximo de R\$ 789.662,87 (setecentos e oitenta e nove mil, seiscentos e sessenta e dois reais, oitenta e sete centavos), devido a margem do intervalo de confiança da pesquisa realizada.



Assinatura: SÔNIA ELISETTE RAMPAZZO
CRECISC 55.659



Carta de Apresentação de Parecer Técnico de Avaliação Mercadológica

Florianópolis, 22 de dezembro de 2025

Ao Sr. Antonio Donatti

Ref.: Apresentação de Parecer Técnico de Avaliação Mercadológica

Prezado Senhor,

Sirvo-me da presente, com base na Resolução COFECI nº 1066/07 e do Alto Normativo COFECI nº 001/11, para apresentar o resultado da Avaliação Imobiliária do imóvel sito à rua Tenente Silveira, nº 600, na cidade de Florianópolis/SC, CEP: 88010-301, circunstanciado no Parecer Técnico de Avaliação Mercadológica SER nº 001/2025, contendo 32 páginas.

O presente parecer foi elaborado levando-se em conta em consideração as condições do citado imóvel, observadas quando da vistoria, tendo sido aplicado o método comparativo direto de dados de mercado por pesquisa de imóveis com características e atributos comparáveis, conforme transações no mercado imobiliário da região.

Agradecendo a confiança despendida, aproveito o ensejo para elevar votos de estima e consideração, colocando-me à disposição para eventuais esclarecimentos que se façam necessários.

Atenciosamente,



Sônia Elisete Rampazzo

Corretora de Imóveis

CRECISC nº 55.659

Recebido por quem dá ciência:

Nome: _____

RG: _____

Data: ____/____/____

Assinatura: _____

PARECER TÉCNICO DE AVALIAÇÃO MERCADOLÓGICA

Conforme Lei nº 6530/78, Resolução COFECI nº 1066/07 e Ato Normativo COFECI nº 001/11.

Imóvel Avaliando: Rua Tenente Silveira, 600

Finalidade do Parecer: Determinação do Valor Mercadológico de vEnda

Interessado: Sr. Antonio De Azevedo Donatti

Sônia Elisete Rampazzo
CRECI 55.659/SC

Data: 22/12/2025



Vista do Imóvel Avaliando

SUMÁRIO

1. SOLICITANTE	3
2. FINALIDADE	3
3. DA COMPETÊNCIA	3
4. PARTES DA ABNT/NBR	4
5. ABREVIATURAS	4
6. IMÓVEL AVALIANDO	5
7. VISTORIA	5
8. DESCRIÇÃO DO IMÓVEL	5
8.1. REGISTRO FOTOGRÁFIO DO IMÓVEL AVALIANDO	9
9. CARACTERÍSTICAS DA REGIÃO	12
10. CONFRONTAÇÕES	12
11. MAPA DE LOCALIZAÇÃO	13
12. VISTA AÉREA	13
13. METODOLOGIA UTILIZADA	13
14. PESQUISA DE MERCADO – IMÓVEIS REFERENCIAIS	14
14.1. R1 – IMÓVEL REFERENCIAL 1	14
14.2. R2 – IMÓVEL REFERENCIAL 2	15
14.3. R3 – IMÓVEL REFERENCIAL 3	15
14.4. R4 – IMÓVEL REFERENCIAL 4	16
15. ADEQUAÇÕES E HOMOGENEIZAÇÃO DE VALORES	16
15.1. QUANTO AOS PREÇOS DO TIPO OFERTA	16
15.2. QUANTO À IDADE DOS IMÓVEIS	18
15.3. RESULTADO AUFERIDO	19
16. NOTAS	20
17. CONCLUSÃO	20
18. ANEXOS	22
18.1. CURRÍCULO DA CORRETORA DE IMÓVEIS EMISSORA DESTE PARECER	22
18.2. TABELA DE VIDA ÚTIL DE IMÓVEIS	23
18.3. TABELA DE ESTADOS DE CONSERVAÇÃO	24
18.4. TABELA DE ROSS-HEIDECHE	25
18.5. MATRÍCULA DO IMÓVEL E GUIA IPTU	26

1. SOLICITANTE

Sr. Antonio De Azevedo Donatti, inscrito no CPF sob o nº 061.603.489-06, residente e domiciliado à Rua Tenente Silveira, nº 600, apartamento nº 707, Florianópolis / SC, CEP: 88010-301.

2. FINALIDADE DO PTAM

Este Parecer Técnico tem por finalidade determinar o valor de mercado para VENDA do apartamento situado à Rua Tenente Silveira, 600, no bairro Centro, CEP: 88010-301, de propriedade de Antonio De Azevedo Donatti, inscrito no CPF sob o número 061.603.489-06, imóvel este descrito nos termos da matrícula nº 11.037 do 1º Ofício de Registro de Imóveis de Florianópolis, e devidamente cadastrado junto à Prefeitura do Município de Florianópolis como contribuinte municipal na PMF nº 52.14.089.0498.046.811.

3. DA COMPETÊNCIA

Este parecer está em conformidade com a Lei 6.530, de 12 de maio de 1978 (D.O.U. de 15/05/1978), a qual regulamenta a profissão de Corretor de Imóveis, em atenção ao disposto em seu artigo 3º, o qual versa que ***“Compete ao Corretor de Imóveis exercer a intermediação na compra, venda, permuta e locação de imóveis, podendo, ainda, opinar quanto à comercialização imobiliária”***.

Em adição, a elaboração deste parecer respeita a Resoluções do COFECI - Conselho Federal de Corretores de Imóveis nº 1.066, de 22 de novembro de 2007 (D.O.U. de 29/11/2007), que estabelece nova regulamentação para a elaboração de Parecer Técnico de Avaliação Mercadológica, em atenção ao seu artigo 4º, o qual versa que ***“Entende-se por Parecer Técnico de Avaliação Mercadológica - PTAM - o documento elaborado por Corretor de Imóveis no qual é apresentada, com base em critérios técnicos, análise de mercado com vistas à determinação do valor de comercialização de um imóvel, judicial ou extra-judicialmente”***, e artigos sucessivos, os quais apresentam os requisitos do PTAM, destacando-se o artigo 6º, o qual versa que ***“A elaboração de Parecer Técnico de Avaliação Mercadológica é permitida a todo Corretor de Imóveis, pessoa física, regularmente inscrito em Conselho Regional de Corretores de Imóveis”***.

4. PARTES DA ABNT/NBR

A ABNT/NBR 14.653 é constituída pelas seguintes partes, sob o título geral "Avaliações de Bens".

Parte 1: Procedimentos gerais;

Parte 2: Imóveis urbanos; Parte

3: Imóveis rurais;

Parte 4: Empreendimentos;

Parte 5: Máquinas, equipamentos, instalações de bens industriais em geral;

Parte 6: Recursos naturais e ambientais;

Parte 7: Patrimônio histórico.

A NBR 14.653-1 desempenha o papel de guia, indicando os procedimentos gerais para as demais partes e, seguindo as orientações da Resolução COFECI 1.066/07, foi tomada em consideração em conjunto com a NBR 14.653-2, NBR 14.653-3 e NBR 14.653-4.

5. ABREVIATURAS

A.T.T - Área Total do Terreno

A.T.C - Área Total Construída

A.C - Idade Aparente da Construção

ABNT - Associação Brasileira de Normas Técnicas Art. - Artigo

AT - Área do Terreno

C.M² - Custo por metro quadrado

CNAI - Cadastro Nacional de Avaliadores Imobiliários

CRECISC - Conselho Regional de Corretores de Imóveis de Santa Catarina DTC -

Depreciação por Tempo de Construção

IA - Imóvel em Avaliação

IPTU - Imposto Predial Territorial Urbano.

M² - Metro quadrado

MG - Média Geral

NBR - Normas Brasileiras

PTAM - Parecer Técnico de Avaliação Mercadológica

Rs - Referenciais

R.F.D - Resultado do Fator de Depreciação.

TG - Total Geral

V.G.V ou V.G.L - Valor Global da Venda ou Locação

V.L - Valor da Locação

V.M - Valor Médio

V.V - Valor de Venda

6. IMÓVEL AVALIANDO

O imóvel objeto deste PTAM, de propriedade de Antonio de Azevedo Donatti, está localizado à Rua Tenente Silveira, 600, matrícula nº 11.037 do 1º Ofício de Registro de Imóveis de Florianópolis, nos seguintes termos:

“1º) apartamento número 707, localizado no 7º pavimento do Edifício Residencial Gov. Ivo Silveira, situado à Rua Tenente Silveira, número 600, Centro, nesta Capital, com a área real privativa de 61,96m², área real comum de divisão proporcional de 9,041m², perfazendo 71,00m² de área real total, ocupando 1,1962% de fração ideal do terreno com a área total de 753,90m²; cadastrado na PMF sob nº 52.14.089.0498.046.811, estando o respectivo título aquisitivo devidamente matriculado no 1º ofício de registro de imóveis desta Comarca, livro 2/RG, folha 01, sob o nº 11.037.

7. VISTORIA

O imóvel foi vistoriado "*in loco*" por esta subscritora, no dia 17/12/2025 no período da manhã, e sendo conferida a metragem do prédio, verificada a idade do mesmo, analisado o estado de conservação, as avarias, as benfeitorias e a qualidade do material utilizado em sua edificação.

8. DESCRIÇÃO DO IMÓVEL

Apartamento em andar alto, sol em todas os cômodos tendo ótima iluminação e ventilação, com 61,96m² de área privativa conta com dois (02) dormitórios, sendo 1 suíte, dois (02) banheiros,

sendo um com ventilação natural e o outro ventilação forçada, cozinha integrada com a sala e o hall, ótima posição solar, área de serviços.

O imóvel conta com móveis planejados fixos da sala, cozinha, suíte, banheiros e área de serviços.

O Condomínio possui torre única, de onze (12) andares, sendo oito (08) apartamentos por andar (sendo apenas 4 no primeiro andar e 5 no décimo segundo, totalizando 89 unidade), dois (02) elevadores, jardim interno para socialização, guarita frontal.

A construção é de 1979, mas passou por restauros das fachadas e um retrofit no período de 2015/2017.

Condomínio conta com sistema de segurança para entrada, exigindo tag ou digital.

Em ruas próximas temos escolas, universidades, supermercados, padarias, farmácias, comércio local, cafés e praças.

São apresentadas a seguir, em tabelas, as características que descrevem o imóvel avaliando.

Sobre o Terreno

Frente	15 m
Orientação cardeal	Leste
Extensão	50 m
Topologia	Inclinado
Posição	Final da quadra

Sobre a Edificação

Posição em relação à rua	acima
Quantidade de torres/blocos	1
Quantidade de andares	12
Quantidade de unidades	89
Quantidade de subsolos	1
Idade	46 anos
Idade aparente	35 anos
Aspecto geral	Médio
Revestimento da fachada	Alvenaria
Esquadria porta	vidro temperado
Esquadria janelas	alumínio
Quantidade de elevadores sociais	1
Quantidade de elevadores de serviço	1
Entrada social de pedestre	1
Entrada de serviço	0
Entrada de veículo	2
Entrada de visitante	0
Entrada veicular de serviço	0
Portaria	1
Interfone	Sim
Piscina	Não tem
Salão de festas	Não tem
Sala de jogos	Não tem
Cinema	Não tem
Quadra	Não tem
Sauna úmida	Não tem
sauna seca	Não tem
Jardim	1
Churrasqueira	Não tem
Sala de Internet	Não tem
Sala de reunião/cursos	Não tem
Auditório	Não tem
Pista de cooper	Não tem
Bicicletário	1
Hidrômetro individual	Não tem

Sobre a unidade em avaliação

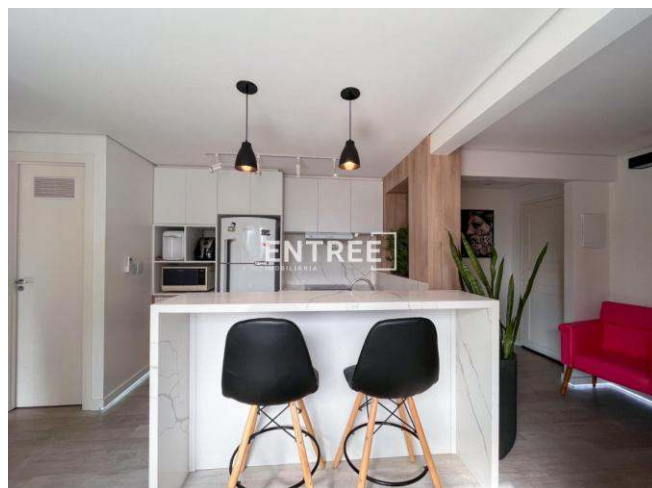
Orientação das janelas principais	Norte / Noroeste
-----------------------------------	------------------

Cômodo	Descrição	Piso	Parede	Acabamento da parede	Teto
Hall de entrada	Poltronas e Paineis em MDF	Vinílico	Alvenaria e Madeira	texturizadas	acabamento em gesso
Suite	Armários planejados sob medida	Vinílico	Alvenaria	pintura em perfeito estado	acabamento em gesso
Banheiro da suíte	Armário planejado sob medida e box vidro temperado	Vinílico e Porcelanato	Porcelanato	Porcelanato	acabamento em gesso
Sala de estar / tv	Armários planejados sob medida com acabamento em gesso no teto e iluminação direta e indireta.	Vinílico	Alvenaria	pintura em perfeito estado e painel de parede.	acabamento em gesso com iluminação indireta
Cozinha	Cozinha integrada à sala com armários planejados sob medida e com bancada em quartzolacada para refeição	Vinílico	Alvenaria / Madeira e Porcelanato	Móveis planejados	alvenaria
Lavanderia	Armários planejados sob medida, máquina de lavar, tanque e bancada em granito.	Vinílico	Alvenaria	Alvenaria	acabamento em gesso
Banheiro Social	Armário planejado sob medida e box vidro temperado	Vinílico e Porcelanato	Porcelanato	Porcelanato	acabamento em gesso

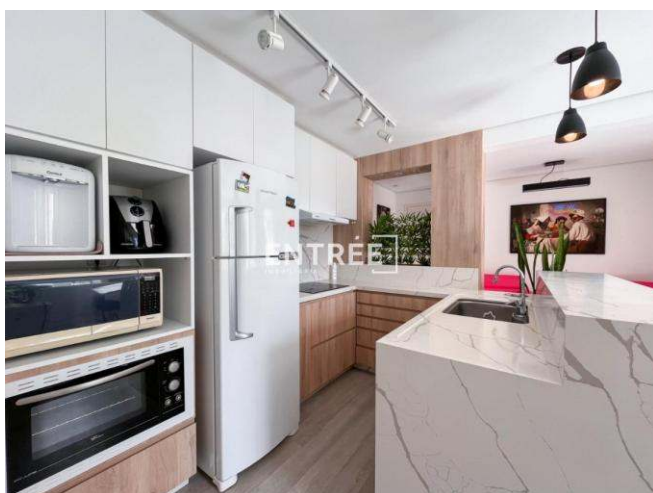
8.1 Registro Fotográfico do Imóvel Avaliando



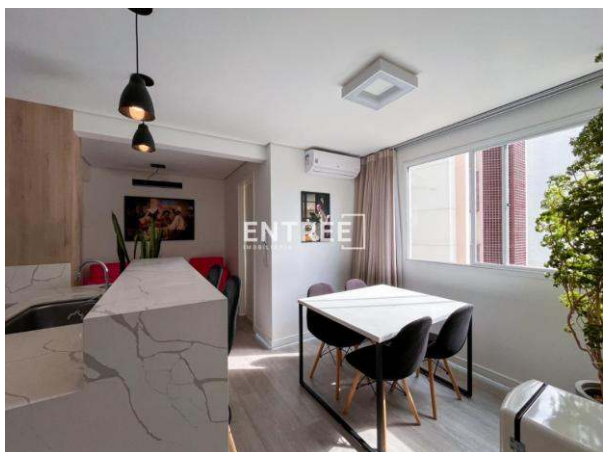
Hall do apto



Cozinha / Sala / Hall



Cozinha e Sala integradas



Sala



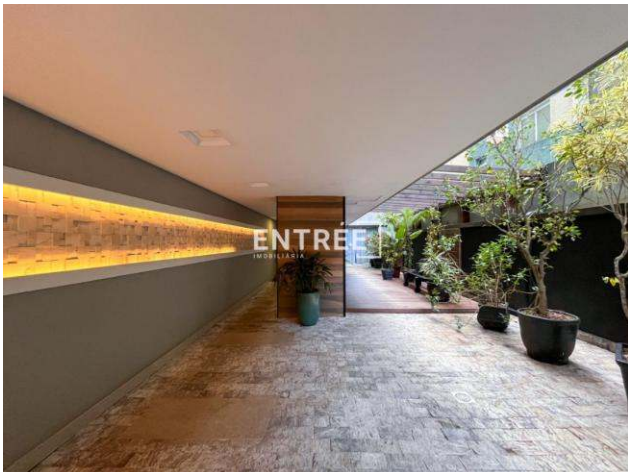
Quarto Suíte



Banheiro Suíte / Banheiro Social



Lavanderia



Hall do Edifício



Fachada do Edifício

9. LOCALIZAÇÃO E CARACTERÍSTICAS DA REGIÃO

O imóvel avaliando está localizado à Rua Tenente Silveira 600, num quarteirão entre as ruas Felipe Schmidt, Esteves Junior e Av. Rio Branco, local que apresenta as características apresentadas na tabela a seguir.

Sobre a Região
Zoneamento: ARM 12.5 - Área Residencial Mista
Principal Avenida próxima: Av. Rio Branco

Elementos valorizantes nas proximidades (raio de 1mil metros)

04 Centro Comercial
03 Praças
vários Pontos de ônibus
04 Padarias
08 Cafés
03 Supermercados
02 Agência dos Correios
04 Restaurantes
06 Colégios de ensino fundamental e médio
03 Universidades
03 Farmácias
04 Agências de grandes bancos nacionais

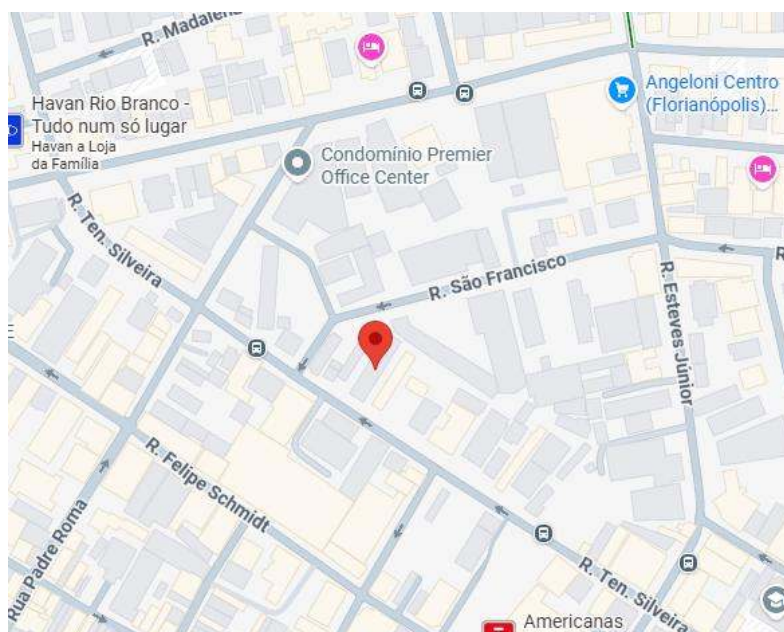
Infraestrutura e serviços públicos

Rua pavimentada
Rede de gás
Rede de telefonia
Rede de eletricidade
Rede de TV a Cabo
Rede de Internet
Rede de água e esgoto

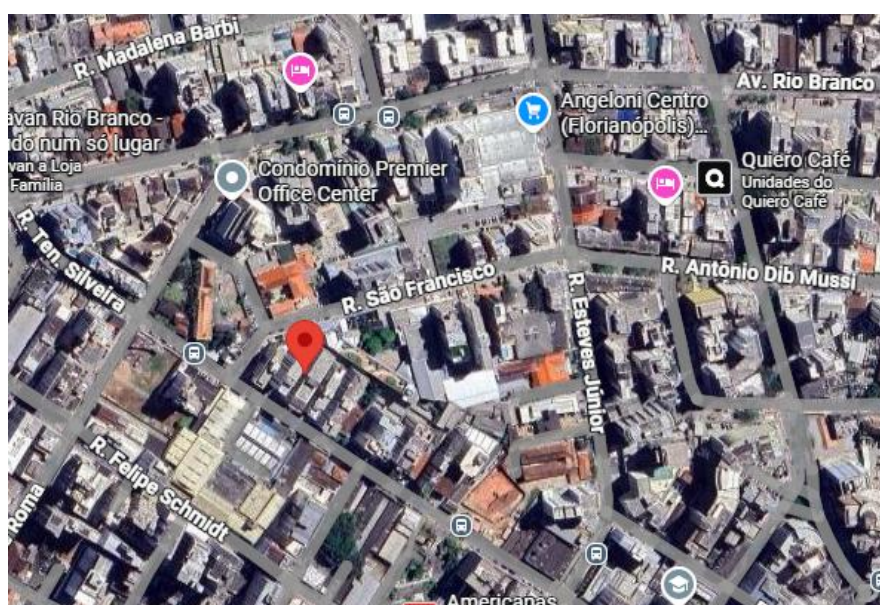
10. CONFRONTAÇÕES

A descrição exata e suas confrontações estão melhor caracterizadas na Matrícula de nº 11.037 do 1º Ofício de Registro de Imóveis do município de Florianópolis e faz parte integrante deste Parecer, sendo que as possíveis alterações estarão contidas nas averbações desse documento.

11. MAPA DE LOCALIZAÇÃO



12. VISTA AÉREA



13. METODOLOGIA UTILIZADA

Em conformidade com a Resolução COFECI 1.066/07, o anexo IV do Ato Normativo 001/2011 do COFECI e considerando o item 8.2.1 da ABNT/NBR 14.653, para a elaboração deste Parecer Técnico de Avaliação Mercadológica e a realização da avaliação do imóvel objeto deste parecer, utilizou-se o “Método Comparativo Direto de Dados de Mercado”.

Pelo método aplicado, foi levada em consideração as diversas tendências e flutuações do mercado imobiliário, identificando-se imóveis que tenham elementos com atributos

comparáveis, chamados imóveis referenciais, para compará-los com o imóvel em avaliação. A partir da ponderação dos dados obtidos, foi possível determinar o valor do bem imóvel.

É nesse contexto que este método se apresenta como o mais recomendado e utilizado para a avaliação de valor de imóveis.

14. PESQUISA DE MERCADO – IMÓVEIS REFERENCIAIS (Rs)

A determinação do valor do imóvel em avaliação, foi realizada pela comparação no mercado de outros quatro (04) imóveis que apresentam elementos com atributos comparáveis. Estes imóveis, sendo referenciais, foram utilizados no método aplicado neste parecer.

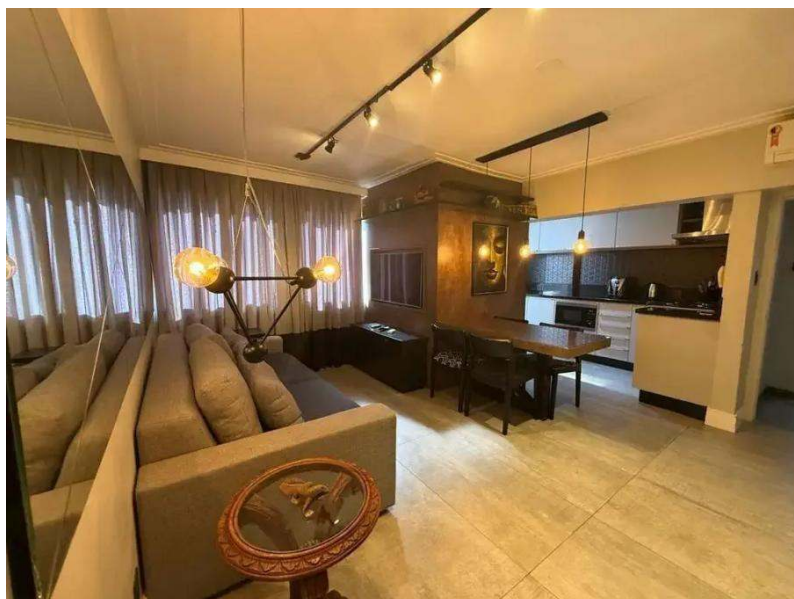
14.1 R1 – Imóvel Referencial 1



R\$ 760.000,00 – 57 m² – 35 anos
Imóvel à venda com EL – Luiz Athoff Solução em Imóveis

[Apartamento com 2 quartos e com salão de festas, 57 m² em Centro, Florianópolis - ZAP Imóveis](#)

14.2 R2 – Imóvel Referencial 2



R\$ 850.000,00 – 61 m² – 35 anos

Imóvel à venda com Imobiliária Gralha

[Apartamento com 2 quartos na Rua Tenente Silveira, --, Centro, Florianópolis - SC ID:35256023](#)

14.3 R3 – Imóvel Referencial 3



R\$ 790.000,00 – 62 m² – 36 anos

Imóvel à venda na Auxiliadora Predial

[Apartamento com 2 quartos e com elevador, 62 m² em Centro, Florianópolis - ZAP Imóveis](#)

14.4 R4 - Imóvel Referencial 4



R\$ 569.000,00 – 50 m² – 33 anos

Imóvel à venda na MARB Imóveis

[Apartamento com 2 quartos e mobiliado, 50 m² em Centro, Florianópolis - ZAP Imóveis](#)

15 ADEQUAÇÕES E HOMOGENEIZAÇÃO DE VALORES

Apesar da similitude dos imóveis referenciais com o imóvel avaliando, foram necessárias aplicações de cálculos de adequação para a correta obtenção de realidades homogêneas para a conclusão apresentada. Seguem descrições dos cálculos aplicados.

15.1 Quanto aos preços do tipo oferta

Para os imóveis referenciais cuja fonte de pesquisa tenha sido uma oferta de mercado, entende-se que normalmente os preços praticados sejam superiores ao verdadeiro valor do imóvel, tornando necessária adequação pela aplicação de um fator redutor para adequá-los ao valor de mercado.

Considerando a ABNT/NBR 14.653-2, item 8.2.1.3.4. (o qual versa que “*Os dados de oferta são indicações importantes do valor de mercado. Entretanto, devem-se considerar superestimativas que em geral acompanham esses preços e, sempre que possível, quantificá-las pelo confronto com dados de transações.*”), segue tabela com a aplicação do fator redutor de 5% (cinco por cento) sobre o preço anunciado de cada imóvel nas condições supra descritas.

O cálculo da aplicação do citado fator redutor foi obtido pela aplicação da seguinte fórmula:

$$\text{valor de mercado} = \text{valor anunciado} - \frac{\text{valor anunciado} \times 5}{100}$$

Na tabela abaixo, a coluna “Fator Redutor de Negociação” apresenta o valor a ser diminuído do valor do anúncio à ordem de 5% (cinco por cento) deste; e a coluna à direita, “Valor de

Mercado do m²” apresenta o valor reduzido de cada imóvel referencial, já dividido pela sua metragem quadrada apresentada na coluna “Área Construída (m²)”.

DADOS DOS IMÓVEIS REFERENCIAIS						5%	
	Endereço	Área Construída (m ²)	Fonte da Pesquisa	Valor de Venda	Idade do Imóvel	Fator Redutor de Negociação	Valor de Mercado do m ²
R1	Rua Tenente Silveira	57	Anúncio	R\$ 760.000,00	35	38.000,00	R\$ 12.666,66
R2	Rua Tenente Silveira	61	Anúncio	R\$ 850.000,00 (- 100 mil VG)	35	37.500,00	R\$ 11.680,33
R3	Rua Tenente Silveira	62	Anúncio	R\$ 790.000,00	36	39.500,00	R\$ 12.104,84
R4	Rua Tenente Silveira	50	Anúncio	R\$ 569.000,00	33	28.450,00	R\$ 10.811,00

15.2 Quanto à idade dos imóveis

As idades dos imóveis referenciais não são as mesmas que a idade do imóvel avaliando, apresentando, portanto, diferenças quanto ao percentual de vida útil de cada bem, o que torna necessária a homogeneização dos valores para representarem a realidade compatível, no sentido de se obter amostras comparáveis para aferição do valor em conclusão deste parecer.

Os imóveis referenciais mais novos que o imóvel avaliando serão depreciados e os imóveis referenciais mais velhos que o imóvel avaliando terão seus valores aumentados (valorizados), em ambos os casos será usada a devida proporção de idade para se obter o valor que estes referenciais teriam se tivessem a mesma idade e estado de conservação do imóvel avaliando.

A base de cálculo será obtida pela aplicação das seguintes fórmulas, as quais se utilizam da tabela de Ross-Heidecke, presente nos anexos deste parecer.

$$\text{Valor Depreciado} = \text{Valor do Imóvel} - \left(\frac{\text{Valor do imóvel} \times \text{fator RossHeideck}}{100} \right)$$

$$\text{Valor Valorizado} = \frac{\text{Valor do Imóvel}}{\frac{(100 - \text{fator RossHeideck})}{100}}$$

Calculou-se a diferença de idade entre os imóveis referenciais e o imóvel avaliando e foi levado em consideração que estes imóveis teriam uma vida útil de 70 anos para a identificação da idade percentual de vida do imóvel, pela aplicação da seguinte fórmula:

$$\text{Idade percentual de vida do imóvel} = \frac{\text{Idade do imóvel}}{\text{Vida útil}} \times 100$$

A tabela apresenta a idade do IA (Imóvel Avaliando), a qual foi considerada para a aplicação da fórmula acima nos cálculos realizados.

A última coluna à direita da tabela, a seguir, apresenta o valor do metro quadrado (m²) de cada imóvel referencial já tendo sido aplicados os cálculos até então descritos; e sua última linha abaixo apresenta a média aritmética desses valores.

DADOS DO IMÓVEL EM AVALIAÇÃO (IA)

Construção (m²): 61,96

Idade do IA: 46

DADOS DE HOMOGENEIZAÇÃO DOS IMÓVEIS REFERENCIAIS

	Diferença de idade entre o IA e o IR14/70	Vida útil do imóvel	Idade percentual de vida do imóvel (em %)	Estado de Conservação		Coluna na Tabela Ross-Heidecke	Índice na Tabela Ross-Heidecke	Valor do m² de Venda (homogeneizado)
R1	11	70	50,00	Entre reparos simples e importantes	F	6	58,20	R\$ 11.822,22
R2	11	70	50,00	Entre reparos simples e importantes	F	6	58,20	R\$ 10.903,65
R3	10	70	51,43	Entre reparos simples e importantes	F	6	59,60	R\$ 11.396,78
R4	13	70	47,14	Entre reparos simples e importantes	F	6	56,90	R\$ 10.014,90
							Total:	R\$ 44.137,55
Média de m² corrigido e homogeneizado:								R\$ 11.034,39

15.3 Resultado Auferido

Em conformidade com os princípios, definições e procedimentos estabelecidos pela **NBR 14.653 – Avaliação de Bens**, da Associação Brasileira de Normas Técnicas – ABNT, especialmente no que se refere à exigência de identificação adequada do estado de conservação, padrão construtivo e condições de uso do bem avaliando, registra-se que o presente imóvel passou por reforma integral recente, abrangendo:

- substituição completa das instalações elétricas e hidráulicas;
- atualização de revestimentos, pisos e acabamentos;
- instalação de mobiliário e equipamentos de padrão superior;
- modernização de ambientes e melhoria funcional;
- elevação da vida útil econômica e da liquidez de mercado.

Nos termos da NBR 14.653, a homogeneização e o tratamento das amostras devem considerar os fatores influenciadores da formação do valor, entre eles o padrão construtivo e o estado de conservação. Dessa forma, mostra-se tecnicamente adequada a aplicação de um fator de valorização sobre o valor médio homogeneizado por metro quadrado, com vistas a refletir o efetivo patamar de qualidade e o novo estado do imóvel.

Propõe-se, assim, a adoção de um **fator de valorização entre 8% e 10%**, percentual compatível com práticas de mercado e fundamentado no impacto econômico das melhorias executadas.

Com a aplicação do referido fator, obtém-se:

- valor ajustado do m²: entre **R\$ 11.917,14** e **R\$ 12.137,83**;
- valor final ajustado do imóvel: entre **R\$ 738.386,07** e **R\$ 752.059,88**.

Portanto, os valores apresentados atendem aos critérios técnicos e às normas vigentes, representando estimativa justa, proporcional e fundamentada, refletindo adequadamente as características específicas do imóvel avaliado.

16 NOTAS

Diversos elementos podem interferir na definição do valor de mercado de um imóvel, destacando-se inclinação do terreno, características desvalorizantes, tal qual área de alagamento, fiações, presença de feiras livres na frente, dentre tantas outras, bem como outros elementos influenciam o crescimento do valor do imóvel pela característica de seu entorno, pelas melhorias públicas desejáveis e aspectos naturais. Contudo, na avaliação do imóvel objeto deste parecer, as possíveis influências supramencionadas não foram consideradas, uma vez que os imóveis referenciais obtidos se situam nas imediações do imóvel avaliando.

Portanto, todos os imóveis referidos neste parecer, tanto os referenciais quanto o avaliando, possuem a mesma proximidade com as características públicas valorizantes e desvalorizantes, tornando desnecessário, matematicamente, considerá-las, especificamente para este caso.

17 CONCLUSÃO

Com base em pesquisa de imóveis com elementos e características comparáveis e por meio do tratamento técnico e ponderações dos seus atributos, utilizando o Método Comparativo Direto de Dados de Mercado e aplicadas as devidas técnicas de homogeneização que permitem a determinação do valor levando em consideração as diversas tendências e flutuações específicas do mercado imobiliário, a despeito de outros ramos da economia, conclui-se o quanto segue acerca do Valor de Mercado do imóvel objeto deste Parecer Técnico de Avaliação Mercadológica é de **R\$ 752.059,88** (setecentos e cinquenta e dois mil, cinquenta e noventa reais, oitenta e oito centavos).

VALOR DO IMÓVEL AVALIADO: R\$ 752.059,88
(setecentos e cinquenta e dois mil, cinquenta e noventa reais, oitenta e oito centavos).

Por tratar-se de um Parecer Técnico de Avaliação Mercadológica expedida comercial que se louva em informações obtidas junto ao mercado imobiliário, considerando imóveis com características e localização sócia econômica semelhante, deve-se prever uma possível variação de até 5% (cinco por cento) no valor acima expresso, para mais ou para menos, (-5% a + 5%), diante dos interesses inerentes do próprio mercado e de seu proprietário. Então, temos, 714.456,89 (setecentos e quatorze mil, quatrocentos e cinquenta e seis reais, noventa e nove centavos) e o máximo de R\$ 789.662,87 (setecentos e oitenta e nove mil, seiscentos e sessenta e dois reais, oitenta e sete centavos), devido a margem do intervalo de confiança da pesquisa realizada.



Assinatura: SÔNIA ELISETE RAMPAZZO
CRECISC 55.659

18 ANEXOS**18.1 Currículo da Corretora de Imóveis emissora deste Parecer****Dados Pessoais****18.1.1** Nome: Sônia Elisete Rampazzo

18.1.2 Data de Nascimento: 26/04/1964

18.1.3 Naturalidade: Erechim/RS

18.1.4 Qualificação: Corretora de Imóveis

18.1.5 CRECISC: 55.659 - 11ª Região (Santa Catarina)

18.1.6 Endereço: Rua Cristóvão Nunes Pires, 150 – apto 404. Centro – Florianópolis/SC.

18.1.7 CPF: 411.313.550-91

18.1.8 Telefone: (48) 99618.1473

18.1.9 E-mail: sonia.rampazzo@creci.org.br**Formação Acadêmica**

- Graduação: Biologia
- Mestrado: Desenvolvimento Regional
- Doutorado: Ecologia – Planejamento Ambiental

Habilidades Profissionais

18.1.10 Experiência na área Imobiliária como Corretora de Imóveis desde 2023;

18.1.11 Síndica em Condomínio Residencial por 9 anos (2014 – 2022).

Assinatura:



Sônia Elisete Rampazzo

18.2 Tabela de Vida Útil de Imóveis

Lista de Vida Útil de Imóveis (Bureau of Internal Revenue)

IMÓVEL	TIPO	PADRÃO	VIDA ÚTIL (em anos)
RESIDENCIAL	BARRACO	RÚSTICO	5
		SIMPLES	10
	CASA	DE MADEIRA	45
		RÚSTICO	60
		ECONÔMICO, SIMLES ou MÉDIO	70
		FINO ou LUXO	60
	APARTAMENTO	ECONÔMICO, SIMLES ou MÉDIO	70
		FINO ou LUXO	60
COMERCIAL	ESCRITÓRIO	ECONÔMICO ou SIMPLES	70
		MÉDIO	60
		FINO ou LUXO	50
	LOJA		
INDUSTRIAL	ARMAZÉM		75
	GALPÃO	RÚSTICO ou SIMPLES	60
		MÉDIO	80
		SUPERIOR	80
	COBERTURA	RÚSTICO ou SIMPLES	20
		SUPERIOR	30
	FÁBRICA		
RURAL	SILO		75
	DEMAIS CONSTRUÇÕES RURAIS		60
BANCO			70
HOTEL			50
TEATRO			50

18.3 Tabela de Estados de Conservação

Esta tabela é usada para a localização dos fatores da Tabela de Ross-Heidecke a serem aplicados nas fórmulas utilizadas neste parecer.

Tabela de Classificação do Estado de Conservação do Imóvel

CLASSIFICAÇÃO	CÓDIGO
Novo	A
Entre novo e regular	B
Regular	C
Entre regular e reparos simples	D
Reparos simples	E
Entre reparos simples e importantes	F
Reparos importantes	G
Entre reparos importantes e sem valor	H
Sem valor	I

18.4 Tabela de Ross-Heidecke

Tabela de Ross-Heidecke para Depreciação de Imóveis								
IDADE EM % DE VIDA	ESTADO DE CONSERVAÇÃO							
	A	B	C	D	E	F	G	H
2	1,02	1,05	3,51	9,03	18,90	39,30	53,10	75,40
4	2,08	2,11	4,55	10,00	19,80	34,60	53,60	75,70
6	3,18	3,21	5,62	11,00	20,70	35,30	54,10	76,00
8	4,32	4,35	6,73	12,10	21,60	36,10	54,60	76,30
10	5,50	5,53	7,88	13,20	22,60	36,90	55,20	76,60
12	6,72	6,75	9,07	14,30	23,60	37,70	55,80	76,90
14	7,98	8,01	10,30	15,40	24,60	38,50	56,40	77,20
16	9,28	9,31	11,60	16,60	25,70	39,40	57,00	77,50
18	10,60	10,60	12,90	17,80	26,80	40,30	57,60	77,80
20	12,00	12,00	14,20	19,10	27,90	41,80	58,30	78,20
22	13,40	13,40	15,60	20,40	29,10	42,20	59,00	78,50
24	14,90	14,90	17,00	21,80	30,30	43,10	59,60	78,90
26	16,40	16,40	18,50	23,10	31,50	44,10	60,40	79,30
28	17,90	17,90	20,00	24,60	32,80	45,20	61,10	79,60
30	19,50	19,50	21,50	26,00	34,10	46,20	61,80	80,00
32	21,10	21,10	23,10	27,50	35,40	47,30	62,60	80,40
34	22,80	22,80	24,70	29,00	36,80	48,40	63,40	80,80
36	24,50	24,50	26,40	30,50	38,10	49,50	64,20	81,30
38	26,20	26,20	28,10	32,20	39,60	50,70	65,00	81,70
40	28,80	28,80	29,90	33,80	41,00	51,90	65,90	82,10
42	29,90	29,80	31,60	35,50	42,50	53,10	66,70	82,60
44	31,70	31,70	33,40	37,20	44,00	54,40	67,60	83,10
46	33,60	33,60	35,20	38,90	45,60	55,60	68,50	83,50
48	35,60	35,50	37,10	40,70	47,20	56,90	69,40	84,00
50	37,50	37,50	39,10	42,60	48,80	58,20	70,40	84,50
52	39,50	39,50	41,90	44,00	50,50	59,60	71,30	85,00
54	41,60	41,60	43,00	46,30	52,10	61,00	72,30	85,50
56	43,70	43,70	45,10	48,20	53,90	62,40	73,30	86,00
58	45,80	45,80	47,20	50,20	55,60	63,80	74,30	86,60
60	48,80	48,80	49,30	52,20	57,40	65,30	75,30	87,10
62	50,20	50,20	51,50	54,20	59,20	66,70	75,40	87,70
64	52,50	52,50	53,70	56,30	61,10	68,30	77,50	88,20
66	54,80	54,80	55,90	58,40	69,00	69,80	78,60	88,80
68	57,10	57,10	58,20	60,60	64,90	71,40	79,70	89,40
70	59,50	59,50	60,50	62,80	66,80	72,90	80,80	90,40
72	62,20	62,20	62,90	65,00	68,80	74,60	81,90	90,90
74	64,40	64,40	65,30	67,30	70,80	76,20	83,10	91,20
76	66,90	66,90	67,70	69,60	72,90	77,90	84,30	91,80
78	69,40	69,40	72,20	71,90	74,90	89,60	85,50	92,40
80	72,00	72,00	72,70	74,30	77,10	81,30	86,70	93,10
82	74,60	74,60	75,30	76,70	79,20	83,00	88,00	93,70
84	77,30	77,30	77,80	79,10	81,40	84,50	89,20	94,40
86	80,00	80,00	80,50	81,60	83,60	86,60	90,50	95,00
88	82,70	82,70	83,20	84,10	85,80	88,50	91,80	95,70
90	85,50	85,50	85,90	86,70	88,10	90,30	93,10	96,40
92	88,30	88,30	88,60	89,30	90,40	92,20	94,50	97,10
94	91,20	91,20	91,40	91,90	92,80	94,10	95,80	97,80
96	94,10	94,10	94,20	94,60	95,10	96,00	97,20	98,50
98	97,00	97,00	97,10	97,30	97,60	98,00	98,00	99,80
100	100,00	100,00	100,00	100,00	100,00	100,00	100,00	100,00

BOOK No. 2 GENERAL RECORD

1ST REGISTRY OFFICE OF DEEDS AND REAL ESTATE RECORDS

registration

page

FLORIANÓPOLIS - Santa Catarina

11.037

01

Florianópolis, December 28, 1979

Property: AN APARTMENT NO. 707-B, located on the 7th floor of the GOVERNADOR SILVEIRA building at 130 Tenente Silveira Street in this city, with a private area of 61.96 square meters and a common area of 9.0410 square meters, totaling 71.0010 square meters of constructed area; representing a 1.1962% undivided interest in the land with a total area of 753.90 square meters, measuring 15.0 meters in frontage and 50.26 meters from front to back, where it adjoins property of the Congregation of the Little Servant Sisters of the Immaculate Conception; on the right side it adjoins property of Osni Barbato and the aforementioned Congregation; and on the left side it adjoins property of the heirs of Laura Olinger and the Congregation. Owner: Construtora Comercial e Industrial S/A - COMASA, headquartered in Curitiba, CGC No. 76.492.685/0001-00, represented hereby Tadeu Luiz da Costa and Osny Amaro Romão, Brazilians. Previous Registration: Registration 1868 and R1/723 and R1/724 pgs 01 of book 2 R, General and incorporation under no. R.2/1868, pgs 01 and v. book 2 R. General of this registry office. REGISTRAR. ----//signature//----

R.1/11.037, on December 28, 1979. By the private purchase and sale agreement, loan with obligations and mortgage and partial release with discharge, dated 06/29/79, from Banestado S/A Crédito Imobiliário, Construtora Comercial e Industrial S/A - COMASA sold the property of this registration to ANTONIO LUIZ CAMPOS, Brazilian, single, of legal age, civil engineer, CPF no. 145.355.059-34, domiciled and residing in this city; for the price of Cr\$ 691,800.15, of which Cr\$ 90,000.00 was paid at closing and the remainder through financing with Banestado S/A Crédito Imobiliário without conditions. The above is true and I certify. REGISTRAR. ----//signature//----

R.2/11.037, on December 28, 1979. By the private agreement referred to in R1/11.037, Antonio Luiz Campos grants, as a specific mortgage, the property of this registration, to Banestado S/A Crédito Imobiliário, a financial institution, with headquarters in Curitiba-PR, CGC No. 76.601.301/0001-32, represented by Honório Petersen Hungria and Abilio de Abreu Neto, as security for the debt of Cr\$601,800.15, equivalent on the date of the agreement to 1716.92719UPC, payable in 240 monthly installments, including interest at a progressive nominal rate of 6 to 10% per year, with the instrument, filed in this registry office, stating the appraisal of the property for purposes of Article 818 of the Civil Code, in the amount of Cr\$ 674,408.63, equivalent to 1924.07814 UPC; penalties and other terms and conditions. The above is true and I certify. REGISTRAR ----//signature//----

AV.3/11.037, on December 28, 1979. Proceed to the annotation of the Integral Mortgage Note no. 3141-16120 series 06/79, of the first-priority mortgage, issued on 06/29/79 by Banestado S/A Crédito Imobiliário, which is also the beneficiary; having as principal debtor Antonio Luiz Campos and securing the debt set forth in R. 2/11.037. The above is true and I certify. REGSITRAR. ----//signature//----

R.4/11.037, on September 27, 1983. By the private purchase and sale agreement with assumption of mortgage debt, from Banestado S/A Crédito Imobiliário, dated 06/30/83, Antonio Luiz Campos and his wife Maria Aparecida Campos sold the property of this registration to JOSÉ WIESE, retired, CIC 019.864.819-72, and his wife OTILIA DE FARIAS WIESE, homemaker, CIC 453.932.659-72, Brazilians, residing and domiciled in Itupuranga-SC, for the price of Cr\$ 8,369,505.33, of which Cr\$ 3,000,000.00 was paid at closing, and the remainder through assumption of the outstanding debt with the lender. The above is true and I certify. REGISTRAR. ----//signature//----

AV.5/11.037, on September 27, 1983. By the private agreement referred to in R.4/11.037, the loan secured by mortgage with Banestado S/A Crédito Imobiliário, recorded under no. R.2/11.037, is assumed by José Wiese and his wife Otília de Farias Wiese, in the amount of Cr\$5,369,505.33,

continued on the back

CONTINUATION OF REGISTRATION NO. 11.037

page 01V.

equivalent on the contract date to 1,496.25493 UPC, payable in 156 monthly installments, including interest at a nominal rate of 9.2% per year, with the instrument filed in this registry office stating the appraisal of the property for purposes of Article 818 of the Civil Code, in the amount of Cr\$ 8,369,505.33, equivalent to 2,332.22855 UPC, penalties and other terms and conditions. The mortgage note recorded under no. AV.3/11.037 remains in full force and effect, with José Wiese and his wife Otilia de Farias Wiese becoming the principal debtors, and securing the debt under the terms and conditions now agreed upon. The above is true and I certify. REGISTRAR.

----//signature//----

R.6/11.037, on September 25, 1985. By the private purchase and sale agreement, with assumption of mortgage debt, combined with amendment and re-ratification of another agreement, from Banestado S/A Crédito Imobiliário, dated 03/30/85, José Wiese and his wife Otilia de Farias Wiese, married under the universal community property regime, represented by João Roberto Wiese, pursuant to power of attorney recorded at page 188, Book 60, on 01/22/85, by Notary Public Odilon B. Vieira, of the 2nd Subdistrict of this capital, sold the property of this registration to VILMAR ZANERIEPE DE SOUZA, transmission technician, and his wife KELMA REGINA PACHECO DE SOUZA, homemaker, Brazilians, married under the universal community property regime, CPF 485.365.479-87, residing and domiciled in this capital, for the price of Cr\$ 48,321,, of which Cr\$ 13,000,000 was paid at closing, and the remainder through assumption of the outstanding debt with the lender. The above is true and I certify. REGISTRAR

----//signature//----

AV.7/11.037, on September 25, 1985. By the private agreement referred to in R.6/11.037, the loan secured by mortgage with Banestado S/A Crédito Imobiliário, recorded under no. R.2/ and AV.5/11.037, is assumed by Vilmar Zaneripe de Souza and his wife Kelma Regina Pacheco de Souza, in the amount of Cr\$,35,321,875 equivalent on the contract date to 1,445.71825 UPC, payable in 135 monthly installments, including interest at a nominal rate of 9.2% per year, with the instrument filed in this registry office stating the appraisal of the property for purposes of Article 818 of the Civil Code, in the amount of Cr\$56,981,147, equivalent to 2,332.22851 UPC, penalties and other terms and conditions. The integral mortgage note recorded under no. AV.3/ and AV.5/11.037 remains in full force and effect, with Vilmar Zaneripe de Souza and his wife Kelma Regina Pacheco de Souza becoming the principal debtors, and securing the debt under the terms and conditions now agreed upon. The above is true and I certify. REGISTRAR.

----//signature//----

AV.8/11.037, on June 22, 1994.

Pursuant to the release filed in this Registry Office, the mortgage registration and mortgage note under nos. R.2, Av.3, Av.5 and Av.7/11.037 are hereby cancelled, by express authorization of the lender. The above is true and I certify. Registrar.

----//signature//----

R.9/11.037, on November 4, 1997.

By the Private Purchase and Sale Agreement and Loan with Obligations and Mortgage, of CEF (Caixa Economica Federal), dated 10/28/1998; VILMAR ZANERIEPE DE SOUZA and his wife KELMA REGINA PACH ECO DE SOUZA sold the property of this registration to LADY IGNES DONATTI, Brazilian, judicially separated, State Public Employee, ID no. 6036505599-SSP/RS and CPF no. 471.215.130-72, residing and domiciled in this Capital; for the price of R\$35,000.00, with R\$20,000.00 financed through the lender and the balance paid directly to the sellers. The above is true and I certify; REGISTRAR:

----//signature//----

R.10/11.037, on November 4, 1997.

By the Private Agreement referred to in R.9/11.037, the property of this registration is granted as a 1st and specific mortgage to Caixa Econômica Federal-CEF, a financial institution headquartered in Brasília-DF, through its branch in SC, CGC no. 00.360.305/0001-04, represented in this act by Giovani Mendonça Lunardi, pursuant to power of attorney recorded at the 2nd Notary Public Office of Brasília-DF, Book 1756, pages 129, on 12/05/96, and substitution of powers at the 4th Notary Public Office of this Capital, Book 031, pages 137 to 140, on 08/11/97; the purchaser, LADY IGNES DONATTI, applied to CEF, as qualified and represented above, and

continued on page 02...

obtained from it a cash loan, in accordance with SFH rules, in the amount of R\$20,000.00, payable in 240 monthly installments, including interest at a nominal rate of 5.1000% per year, with the instrument filed in this registry office stating the appraisal of the property for purposes of Article 818 of the Civil Code, in the amount of R\$35,000.65, penalties and other terms and conditions. The above is true and I certify. REGISTRAR. ----//signature//----

AV.11/11.037, on April 25, 2007.

Title: Private Instrument Authorizing Cancellation of Mortgage of Real Estate Credit Financing, dated 04/18/2007, from CEF; the CANCELLATION of the mortgage referred to in R.10/11.037 is hereby recorded, by express authorization of the lender. Fees - R\$54.69. Seal - R\$1.00. Protocol: No. 65.087 of 04/24/2007. The above is true and I certify. REGISTRAR: ----//signature//----

AV-12/11.037: Florianópolis, July 13, 2021.

MARRIAGE CERTIFICATE, dated 06/26/2021, the **MARRIAGE** of the owner, Lady Ignes Donatti, currently holder of ID no. **4556508-SSP/SC**, is hereby recorded; she married ANSELMO CERELLO, under the **MANDATORY SEPARATION OF PROPERTY** regime, on 06/11/2010, and thereafter began to sign as **LADY IGNES DONATTI CERELLO**. All in accordance with the Marriage Certificate, presented in this registry office. **Protocol:** 125.791 of 06/30/2021. Fees: R\$90.56. Seals R\$2.82 – Inspection Seal: GEL02431-EITI. The above is true and I certify. Signature: ----//signature//----

Arlete Lohn – Deputy Clerk

R-13/11.037: Florianópolis, July 13, 2021.

CONTRACT FOR THE PURCHASE AND SALE OF REAL PROPERTY, LOAN, AND DEED OF TRUST IN GUARANTEE UNDER THE SFH - HOUSING FINANCE SYSTEM, WITH USE OF FUNDS FROM THE FGTS LINKED ACCOUNT OF THE DEBTOR(S), from CEF, dated 06/17/2021, **CONTRACT** no. **1.4444.1519712-3**. **TRANSFEROR:** **LADY IGNES DONATTI CERELLO**, Brazilian, Administrator, CPF 471.215.130-72, ID 4556508-SSP/SC, married to **ANSELMO CERELLO**, Brazilian, retired, CPF 038.256.398-00, ID 10807420-SESP/SC, under the Mandatory Separation of Property regime, on 06/11/2010, who appears in this act as an intervening consenting party, residing and domiciled at Rua Esteves Júnior, 733, Apt. 401, Centro, Florianópolis/SC; **SOLD** the property of this registration to the **ACQUIRER:** **ANTONIO DE AZEVEDO DONATTI**, Brazilia, born on 12/27/1992, Manager, single, not living in a stable union (common-law marriage), CPF 061.603.489-06, Driver's License No. 05193224170-DETRAN/SC, resident and domiciled at Rua Tenente Silveira, 584, apt. 801, Centro, **Florianópolis-SC**. **Amount:** **R\$180,000.00**, of which R\$107,789.97 was paid with personal funds, R\$22,210.03 with funds from the FGTS linked account, and the balance through deed of trust to the lender. The payment of ITBI/DAM no. 21839983-00-2 was presented. The aforementioned contract states that the parties declare that this transaction was not mediated by a Real Estate Broker; and further, the presentation and/or waiver of the Certificates required by Law. (CL) **Protocol:** no. 125.791 of 06/30/2021. Fees: R\$1,388.04. Seals R\$2.82 – Inspection Seal: GEL02433-T960. **FRJ** information: FRJ: 7580014922-7, the amount of R\$390.00 was collected on 06/30/2021. (1st acquisition). The above is true and I certify. Signed: ----//signature//----

Arlete Lohn – Deputy Clerk

R-14/11.037: Florianópolis, July 13, 2021.

Private Agreement referred to in **R.13/11.037**. **FIDUCIARY DEBTOR:** **ANTONIO DE AZEVEDO DONATTI**; Brazilian, CPF 061.603.489-06, Driver's License no. 05193224170-DETRAN/SC; **GRANTS IN DEED OF TRUST**, the property of this registration, to the **CREDITOR:** **CAIXA ECONÔMICA FEDERAL**, enrolled under CNPJ no. 00.360.305/0001-04, headquartered at Setor Bancário Sul, Block 4, Lots 3/4, in Brasília-DF, represented in this act by its attorney-in-fact, **MARIANA RODRIGUES RIBEIRO KUHN**, Brazilian, Retail Portfolio Manager, married, CPF 007.391.399-59, ID 4025014-SSP/SC, residing and domiciled at Rua Felipe Domingues Petry 600, Apt. 306, Praia Comprida, São José/SC, pursuant to power of attorney recorded at the 2nd Notary Public and Protest Office of Brasília/DF, Book 3152-P, pages 182/183 of 07/18/2015, and substitutions of powers recorded respectively at the 2nd Notary Public and Protest Office of Brasília/DF, and at the Office of the Justice of the Peace, of Barra da Lagoa, of the Judicial District of Florianópolis-SC, Book 3210-P, pages 88/89 of 07/07/2016,

- continued on page 2v -

CONTINUATION OF REGISTRATION NO. _____

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11.037**Page: 02v**

Agency responsible for the contract: 409 NEWTON MACUCO, SC. **Total Debt Amount (Financing): R\$50,000.00, payable in 120 monthly installments, including interest at a nominal rate of 7.7208% per year, a reduced nominal interest rate of 7.3474% per year, and an effective rate of 8.0000% and a reduced effective rate of 7.5999% per year, with the instrument stating the value of the property for purposes of sale at Public Auction is R\$282.000,00, penalties and other terms and conditions. (CL). Protocol: No. 125.791 of 06/30/2021. Fees – R\$256,58. Seals R\$2.82 – Inspection seal: GEL02434-W2DB. The above is true and I certify. Signed: ----//signature//----**

Arlete Lohn – Deputy Clerk**AV-15/11.037:** Florianópolis, July 13, 2021.

Private Agreement referred to in **R.13/11.037**, the annotation of **REAL ESTATE CREDIT NOTE no. 1.4444.1519712-3 - Series 0621** is hereby recorded, having as **DEBTOR: ANTONIO DE AZEVEDO DONATTI**, Brazilian, CPF 061.603.489-06, Driver's License No. 05193224170-DETRAN/SC, and as **CREDITOR: CAIXA ECONÔMICA FEDERAL**, enrolled under CNPJ No. 00.360.305/0001-04, as qualified above. **Credit Amount: R\$50,000.00, payable in 120 monthly installments, including interest at a nominal rate of 7.7208% per year, and an effective rate of 8.0000% per year, with the instrument stating penalties and other terms and conditions. Fees Exempt, pursuant to Art. 18 of Law 10.931 of 08/02/2004 (CL). Protocol: No. 125.791 of 06/30/2021. Seals R\$2.82 – Inspection Seal: GEL02435-MIKU. The above is true and I certify. Signed: ----//signature//----**

Arlete Lohn – Deputy Clerk**AV-16/11.037:** Florianópolis, July 13, 2021.

Pursuant to ITBI/PMF/2021, an annotation is hereby recorded to reflect that the property of this registration currently bears **no. 600 at Rua Tenente Silveira**, Centro, Florianópolis-SC, and is registered with the PMF under no. **52.14.089.0498.046-811. (CL). Protocol: No. 125.791 of 06/30/2021. Fees: R\$90.56. Seals R\$2.82 – Inspection seal: GEL02432-SB1A. The above is true and I certify. Signed: ----//signature//----**

Arlete Lohn – Deputy Clerk

Translation note: the watermark reads "FOR CONSULTATION PURPOSES ONLY NOT VALID AS A CERTIFIED COPY"

I, André Vinícius Inacio Penna Mello, telephone number 415 425-2508, mailing address P.O. Box 90487, San Diego, CA 92169, certify that the professional translation of this document from Portuguese to English has been performed by myself, a qualified translator fluent in both languages, and that the following is an accurate and complete translation of the document.

Date: March 5, 2026.

matrícula

folha

11.037

01

Florianópolis, 28 de dezembro de 1979.

Imóvel: UM APARTAMENTO Nº 707-B, sito no 7º andar do edifício GOVERNADOR IVO SILVEIRA à rua Tenente Silveira nº 130 nesta cidade, com área privativa de 61,96m² área comum de 9,0410m², perfazendo um total de 71,0010m² de área construída; ocupando 1,1962% de fração ideal do terreno com área total de 753,90m², medindo 15,00m de frente, por 50,26m da frente aos fundos onde confronta com propriedade da Congregação das Irmãzinhas da Imaculada Conceição no lado direito: confronta com propriedade de Osni Barbato e Congregação Supra e no lado esquerdo / confronta com propriedade da Vva Laura Olinger e a Congregação. **Proprietária:** Construtora Comercial e Industrial S/A - COMASA, com sede em Curitiba-PR, CGC nº 76.492.685/0001-00, representada por Tadeu Luiz da Costa e Osny Amaro Romão, brasileiros. **Registro Anterior:** Mat 1868 e R1/723 e R1/724 fls 01 do livro 2 R, Geral e incorporação sob nº R.2/1868, fls 01 e v. livro 2 R. Geral deste cartório. **OFICIAL.**

Joel L. Westrupp

R.1/11.037, em 28 de dezembro de 1979. Pelo contrato particular de compra e venda, mútuo com obrigações e hipoteca e quitação parcial com desligamento, datado de 29.06.79, do Banestado S/A Crédito Imobiliário, Construtora Comercial e Industrial S/A - COMASA vendeu o imóvel desta matrícula a ANTONIO LUIZ CAMPOS, brasileiro, solteiro, maior, engº civil, CPF nº 145.355.059-34 domiciliado e residente n/ cidade; pelo preço de Cr\$ 691.800,15 sendo Cr\$ 90.000,00 no ato e o restante mediante financiamento junto ao Banestado S/A Crédito Imobiliário sem condições. O referido é verdade e dou fé. **OFICIAL.**

Joel L. Westrupp

R.2/11.037, em 28 de dezembro de 1979. Pelo contrato particular referido no R1/11.037, Antonio Luiz Campos dá, em especial hipoteca, o imóvel desta matrícula, ao Banestado S/A Crédito Imobiliário instituição financeira, com sede em Curitiba-PR, CGC nº 76.601.301/0001-32, representado por Honório Petersen Hungria e Abílio de Abreu Neto, para garantia da dívida de Cr\$ 601.800,15 equivalentes na data do contrato a 1716,92719UPC, pagáveis em 240 prestações mensais, nelas incluídos juros a taxa nominal progressiva de 6 a 10% a.a., constando do título, arquivado neste cartório, a avaliação do imóvel para efeitos do artigo 818 do código civil, que é de Cr\$ 674.408,63 equivalentes a 1924,07814UPC; multas e demais condições. O referido é verdade e dou fé. **OFICIAL.**

Joel L. Westrupp

AV.3/11.037, em 28 de dezembro de 1979. Procedê-se a averbação da Cédula Hipotecária Integral nº 3141/16120 série 06/79 de hipoteca em 1º grau, emitida em 29.06.79 por Banestado S/A Crédito Imobiliário que também é favorecido; tendo como devedor principal Antonio Luiz Campos e garantindo a dívida constante do R. 2/11.037. O referido é verdade e dou fé. **OFICIAL.**

Joel L. Westrupp

DZ

R.4/11.037, em 27 de setembro de 1983. Pelo contrato particular de compra e venda com sub-rogação de dívida hipotecária, do Banestado S/A. Crédito Imobiliário datado de 30-06-83, Antonio Luiz Campos e s/esposa Maria Aparecida Campos, venderam o imóvel desta matrícula a JOSÉ WIESE, aposentado, CIC 019.864.819-72, e s/esposa OTILIA DE FARIAS WIESE, do lar, CIC 453.932.659-72, brasileiros, residentes e domiciliados em Ituporanga-SC, pelo preço de Cr\$8.369.505,33, sendo Cr\$ 3.000.000,00 no ato, e o restante mediante assunção do débito junto ao credor. O referido é verdade e dou fé. **OFICIAL.**

Yolanda L. C. Pereira

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AV.5/11.037, em 27 de setembro de 1983. Pelo contrato particular referido no R. 4/11.037, o mútuo com garantia hipotecária junto ao Banestado S/A. Crédito Imobiliário, registrado sob nº R.2/11.037, é assumido por José Wiese e s/esposa Otilia de Farias Wiese, pelo valor de Cr\$ 8.369.505,33, equivalentes na data do con

trato a 1.496,25493 UPC, pagáveis em 156 prestações mensais, nelas incluídos juros a taxa nominal de 9,2% a.a., constando do título arquivado neste cartório, a avaliação do imóvel para efeitos do artigo 818 do código civil que é de Cr\$8.369.505,33, equivalentes a 2.332,22855 UPC, multas e demais condições. Mantém-se em vigor a cédula hipotecária averbada sob nº AV.3/11.037, passando a ter como devedores principais José Wiese e s/esposa Otilia de Farias Wiese, e garantindo a dívida nas condições ora acordadas. O referido é verdade e dou fé. *Yolanda L. B. Pereira* OFICIAL. *Yolanda L. B. Pereira*

R.6/11.037, em 25 de setembro de 1985. Pelo contrato particular de compra e venda, com sub-rogação de dívida hipotecária, cumulado de aditamento e re-ratificação de outro contrato, do Banestado S/A. Crédito Imobiliário, datado de 30-03-85, José Wiese e s/esposa Otilia de Farias Wiese, casados pelo regime da comunhão universal de bens, representados por João Roberto Wise, consoante instrumento de mandato lavrado às fls. 188, Lº 60 em 22-01-85, pelo Tabelião Odilon B. Vieira, do 2º subdistrito desta capital, venderam o imóvel desta matrícula a VILMAR ZANERIPE DE SOUZA, técnico em transmissão, e s/esposa KELMA REGINA PACHECO DE SOUZA, do lar, brasileiros, casados pelo regime da comunhão universal de bens CPF 485.365.479-87, residentes e domiciliados nesta capital, pelo preço de Cr\$ 48.321.875, sendo Cr\$13.000.000 no ato, e o restante mediante assunção do débito junto ao credor. O referido é verdade e dou fé. OFICIAL. *W. Baccide*

AV.7/11.037, em 25 de setembro de 1985. Pelo contrato particular referido no R. 6/11.037, o mútuo com garantia hipotecária junto ao Banestado S/A. Crédito Imobiliário, registrado sob nº R.2/ e AV.5/11.037, é assumido por Vilmar Zaneripe de Souza e s/esposa Kelma Regina Pacheco de Souza, pelo valor de Cr\$35.321.875, equivalentes na data do contrato a 1.445,71825 UPC, pagáveis em 135 prestações mensais, nelas incluídos juros a taxa nominal de 9,2% a.a., constando do título arquivado neste cartório, a avaliação do imóvel para efeitos do artigo 818 do código civil, que é de Cr\$56.981.147, equivalentes a 2.332,22851 UPC, multas e demais condições. Mantém-se em vigor a cédula hipotecária integral averbada sob nº AV.3/ e AV.5/11.037, passando a ter como devedores principais Vilmar Zaneripe de Souza e s/esposa Kelma Regina Pacheco de Souza, e garantindo a dívida nas condições ora acordadas. O referido é verdade e dou fé. OFICIAL. *W. Baccide*

Av.8/11.037, em 22 de junho de 1994.

Conforme quitação arquivada neste Cartório, procede-se o cancelamento do registro hipotecário e cédula hipotecária sob nºs. R.2, Av.3, Av.5 e Av.7/11.037, 7 por autorização expressa do credor. O referido é verdade e dou fé. OFICIAL. *W. Baccide*

R.9/11.037, Em 04 de Novembro de 1997.

-Pelo Contrato Particular de Compra e Venda e Mútuo com Obrigações e Hipoteca, da CEF, datado de 28-10-1998; VILMAR ZANERIPE DE SOUZA e sua esposa KELMA REGINA PACH ECO DE SOUZA; venderam o imóvel desta matrícula à LADY IGNES DONATTI, brasileira, separada judicialmente, Funcionária Pública Estadual, CI nº 6036505 599-SSP/RS e CPF nº 471.215.130-72, residente e domiciliada nesta Capital; pelo preço de R\$35.000,00, sendo R\$20.000,00 mediante financiamento junto à credora e o restante pago diretamente aos vendedores. O referido é verdade e dou fé. OFICIAL: *Zoe L. Wirtun*

R.10/11.037, Em 04 de Novembro de 1997.

Pelo Contrato Particular referido no R.9/11.037; dá em 1ª e especial hipoteca, o imóvel desta matrícula à Caixa Econômica Federal-CEF, instituição financeira, c/sede em Brasília-DF, por sua filial em SC., CGC nº 00.360.305/0001-04, representada neste ato por Giovani Mendonça Lunardi, conforme procuração lavrada no 2º Ofício de Notas de Brasília-DF, Lº 1756 fls. 129 em 05-12-96 e substabelecimento no 4º Ofício de Notas desta Capital. Lº 031, fls. 137 à 140, em 11-08-97; a Compradora, LADY IGNES DONATTI, recor 339 a CEF, acima qualificada e representa-

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da, e dela obteve um mútuo de dinheiro, segundos as normas do SFH, no valor de R\$20.000,00, pagáveis em 240 prestações mensais, nelas incluídos juros à taxa nominal de 5,1000%a.a., constando do título arquivado neste cartório, a avaliação do imóvel para efeitos do artigo 818 do código civil, que é de R\$35.000,65, multas e demais condições. O referido é verdade e dou fé. OFICIAL: *[Assinatura]*

AV.11/11.037, em 25 de Abril de 2007.

Título: Instrumento Particular de Autorização de Cancelamento de Hipoteca de Financiamento no Crédito Imobiliário, datado de 18-04-2007, da CEF; procede-se o **CANCELAMENTO** da Hipoteca referida no R.10/11.037, por autorização expressa da credora. Emolumentos - R\$54,69. Selo - R\$1,00. Protocolo: nº 65.087 de 24-04-2007. O referido é verdade e dou fé. A OFICIAL: *[Assinatura]*

SPD

AV-12/11.037: Florianópolis, 13 de julho de 2021.

CERTIDÃO DE CASAMENTO, datada de 25-06-2021, procede-se a averbação de **CASAMENTO** da proprietária, Lady Ignes Donatti, atualmente portadora do RG nº 4556508-SSP/SC, que contraiu núpcias com ANSELMO CERELLO, pelo regime da **SEPARAÇÃO DE BENS OBRIGATÓRIA**, em 11-06-2010, à qual passou assinar **LADY IGNES DONATTI CERELLO**. Tudo de acordo com a Certidão de Casamento, apresentada neste cartório. Protocolo: 125.791 de 30/06/2021. Emolumentos: R\$90,56. Selos R\$2,82 - Selo de fiscalização: GEL02431-EIT1. O referido é verdade e dou fé. Ass.: *[Assinatura]*

Arlete Lohn - Escrevente Subst.

R-13/11.037: Florianópolis, 13 de julho de 2021.

CONTRATO DE VENDA E COMPRA DE IMÓVEL, MÚTUO E ALIENAÇÃO FIDUCIÁRIA EM GARANTIA NO SFH - SISTEMA FINANCEIRO DA HABITAÇÃO COM UTILIZAÇÃO DOS RECURSOS DA CONTA VINCULADA DO FGTS DO(S) DEVEDOR(ES), da CEF, datado de 17-06-2021, **CONTRATO nº 1.4444.1519712-3. TRANSMITENTE: LADY IGNES DONATTI CERELLO**, brasileira, Administradora, CPF 471.215.130-72, RG 4556508-SSP/SC, casada com **ANSELMO CERELLO**, brasileiro, aposentado, CPF 038.256.398-00, RG 10807420-SESP/SC, pelo regime da Separação de Bens Obrigatória, em 11/06/2010, o qual comparece no presente ato na qualidade de **interveniente anuente**, residentes e domiciliados à Rua Esteves Júnior, 733, Apto. 401, Centro, Florianópolis/SC; **VENDEU** o imóvel desta matrícula, ao **ADQUIRENTE: ANTONIO DE AZEVEDO DONATTI**, brasileiro, nascido em 27/12/1992, Gerente, solteiro, não convivente em união estável, CPF 061.603.489-06, CNH nº 05193224170-DETRAN/SC, residente e domiciliado na Rua Tenente Silveira, 584, apto 801, Centro, **Florianópolis-SC. Valor: R\$180.000,00**, sendo R\$107.789,97 com recursos próprios, R\$22.210,03 com recursos da conta vinculada do FGTS, e o restante mediante alienação fiduciária junto à credora. Foi apresentado o pagamento do ITBI/DAM nº 21839983-00-2. Consta do referido contrato, que as partes declaram, que a presente transação não foi intermediada por meio de Corretor de Imóveis; e ainda, a apresentação e ou dispensa das Certidões exigidas por Lei.(CL) Protocolo: nº 125.791 de 30/06/2021. Emolumentos R\$1.388,04. Selos R\$2,82 - Selo de fiscalização: GEL02433-T960. Dados do FRJ: FRJ: 7580014922-7, recolhido o valor de R\$390,00, em data de 30/06/2021.(1ª aquisição). O referido é verdade e dou fé. Ass.: *[Assinatura]*

Arlete Lohn - Escrevente Subst.

R-14/11.037: Florianópolis, 13 de julho de 2021.

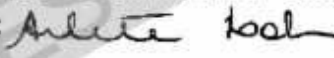
Contrato Particular referido no R.13/11.037. **DEVEDOR FIDUCIANTE: ANTONIO DE AZEVEDO DONATTI**, brasileiro, CPF 061.603.489-06, CNH nº 05193224170-DETRAN/SC; **DÁ EM ALIENAÇÃO FIDUCIÁRIA**, o imóvel desta matrícula, ao **CREDOR: CAIXA ECONÔMICA FEDERAL**, inscrita no CNPJ nº 00.360.305/0001-04, com sede no Setor Bancário Sul, Quadra 4, Lotes 3/4, em Brasília-DF, representada neste ato por sua procuradora, **MARIANA RODRIGUES RIBEIRO KUHN**, brasileira, Gerente de Carteira PF, casada, CPF 007.391.399-59, RG 4025014-SSP/SC, residente e domiciliada à Rua Felipe Domingues Petry, 600, Apto: 306, Praia Comprida, São José/SC, conforme procuração lavrada no 2º Tabelionato de Notas e Protesto de Brasília/DF, Livro 3152-P, fls. 182/183 de 18/07/2015, e substabelecimentos lavrados respectivamente, nas Notas do 2º Tabelião de Notas e Protesto de Brasília/DF, e na Escritania de Paz, da Barra da Lagoa, da Comarca de Florianópolis-SC, Livro 3210-P, fls. 88/89 de 07/07/2016, e Livro 003, fls. 192/200 de 09/09/2016. Agência

- segue na p. 2v -

responsável pelo contrato: 409 NEWTON MACUCO, SC. **Valor Total da Dívida(Financiamento): R\$50.000,00, pagáveis em 120 prestações mensais, nelas incluídos juros à taxa nominal de 7.7208%a.a., taxa de juros nominal reduzida de 7.3474%a.a., e taxa efetiva de 8.0000%a.a., e reduzida de 7.5999%a.a, constando do título, o valor do imóvel para fins de venda em Público Leilão, é de R\$282.000,00, multas e demais condições.(CL). Protocolo: nº 125.791 de 30/06/2021. Emolumentos - R\$256,58. Selos R\$2,82 - Selo de fiscalização: GEL02434-W2DB. O referido é verdade e dou fé. Ass.:** 

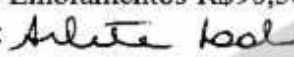
Arlete Lohn - Escrevente Subst.

AV-15/11.037: Florianópolis, 13 de julho de 2021.

Contrato Particular referido no **R.13/11.037**, procede-se a averbação da **CÉDULA DE CRÉDITO IMOBILIÁRIO nº. 1.4444.1519712-3 - Série 0621**, tendo como **DEVEDOR: ANTONIO DE AZEVEDO DONATTI**, brasileiro, CPF 061.603.489-06, CNH nº 05193224170-DETRAN/SC, e como **CREDORA: CAIXA ECONÔMICA FEDERAL**, inscrita no CNPJ nº 00.360.305/0001-04, acima qualificados. **Valor do Crédito: R\$50.000,00, pagáveis em 120 prestações mensais, nelas incluídos juros à taxa nominal de 7.7208%a.a., e taxa efetiva de 8.0000%a.a., constando do título, multas e demais condições. Emolumentos Isentos, conforme art. 18 da Lei 10.931 de 02-08-2004.(CL). Protocolo: nº 125.791 de 30/06/2021. Selos R\$2,82 - Selo de fiscalização: GEL02435-MIKU. O referido é verdade e dou fé. Ass.:** 

Arlete Lohn - Escrevente Subst.

AV-16/11.037: Florianópolis, 13 de julho de 2021.

Conforme ITBI/PMF/2021, procede-se a averbação, para fazer constar que o imóvel desta matrícula, **atualmente tem o nº 600 da Rua Tenente Silveira, Centro, Florianópolis-SC, e está cadastrado na PMF sob o nº 52.14.089.0498.046-811.(CL). Protocolo: nº 125.791 de 30/06/2021. Emolumentos R\$90,56. Selos R\$2,82 - Selo de fiscalização: GEL02432-SB1A. O referido é verdade e dou fé. Ass.:** 

Arlete Lohn - Escrevente Subst.

NAME: ANTONIO DE AZEVEDO DONATTI**CPF: 061.603.489-06****ANNUAL ADJUSTMENT DECLARATION****INCOME TAX - INDIVIDUAL****TAX YEAR 2023****CALENDAR YEAR 2022****TAXPAYER IDENTIFICATION**

Name: ANTONIO DE AZEVEDO DONATTI CPF: 061.603.489-06
Date of Birth: 12/27/1992 Voter ID:
Do you have a spouse or partner? No
Were there any changes to the registration details? No
Is one of the declarants a person with a serious illness or a physical or mental disability? No

Address: RUA TENENTE SILVEIRA Number: 600
Unit: APT. 707 Neighborhood/District: CENTRO
City: FLORIANÓPOLIS State: SC
ZIP Code: 88010-301 Area Code/Telephone:
Email: Area Code/Mobile:

Occupation Type: 01 - EMPLOYEE OF A PRIVATE SECTOR COMPANY, EXCEPT FINANCIAL INSTITUTIONS
Main Occupation: 319 - OTHER MID-LEVEL TECHNICIANS IN PHYSICAL AND CHEMICAL SCIENCES, ENGINEERING AND RELATED FIELDS
Type of Declaration: Original Annual Adjustment Declaration
Receipt Number of the last declaration filed in the 2022 tax year: 01 06.36.22.23-90

DEPENDENTS

No Information

ALIMONY RECIPIENTS

No Information

TAXABLE INCOME RECEIVED FROM LEGAL ENTITY BY THE TAXPAYER

(Values in Reais)

NAME OF THE PAYING SOURCE	INCOME RECEIVED FROM LEGAL ENTITY	OFFICIAL SOCIAL SECURITY CONTRIBUTION	WITHHELD TAX	13 th SALARY	INCOME TAX WITHHELD ON 13 th SALARY
EMS CONSULTORIA ASSESSORIA E EVENTOS LTDA	210.009,87	9.940,56	43.717,42	13.710,86	4.001,56
CNPJ/CPF: 04.522.600/0001-70					
TOTAL	210.009,87	9.940,56	43.717,42	13.710,86	4.001,56

TAXABLE INCOME RECEIVED FROM LEGAL ENTITY BY DEPENDENTS

No information

TAXABLE INCOME RECEIVED FROM INDIVIDUALS AND ABROAD BY THE TAXPAYER

No information

TAXABLE INCOME RECEIVED FROM INDIVIDUALS AND ABROAD BY DEPENDENTS

No information

EXEMPT AND NON-TAXABLE INCOME

(Values in Reais)

12. Income from savings accounts, mortgage bonds, agribusiness, and real estate letters of credit (LCA and LCI), and certificates of agribusiness and real estate receivables (CRA and CRI)					0,42
Beneficiary	CPF	CNPJ of the Paying Source	Name of the Paying Source	Amount	
Taxpayer	061.603.489-06	00.360.305/0001-04	CEF (Caixa Econômica Federal)	0,42	
99. Others					8.870,91

NAME: ANTONIO DE AZEVEDO DONATTI**CPF: 061.603.489-06****ANNUAL ADJUSTMENT DECLARATION****INCOME TAX - INDIVIDUAL****TAX YEAR 2023****CALENDAR YEAR 2022**

Beneficiary	CPF	CNPJ of the Paying Source	Name of the Paying Source	Description	Amount
Taxpayer	007.485.782-77	29.408.732/0001-05	EMS CONSULTORIA ASSESSORIA E EVENTOS L TOA	ALLOWANCE	8.870,91
TOTAL					8.870,91

INCOME SUBJECT TO EXCLUSIVE/DEFINITIVE TAXATION

(Values in Reais)

06. 13 th Salary	13.710,86
TOTAL	13.710,86

TAXABLE INCOME RECEIVED FROM LEGAL ENTITY BY THE TAXPAYER (TAX WITH SUSPENDED EXIGIBILITY)

No information

TAXABLE INCOME RECEIVED FROM LEGAL ENTITY BY THE DEPENDENTS (TAX WITH SUSPENDED EXIGIBILITY)

No information

TAXABLE INCOME FROM LEGAL ENTITY RECEIVED CUMULATIVELY BY THE TAXPAYER

No information

TAXABLE INCOME FROM LEGAL ENTITY RECEIVED CUMULATIVELY BY THE DEPENDENTS

No information

TAX PAID / WITHHELD

(Values in Reais)

01. Complementary Tax:	0,00
02. Tax paid abroad	0,00
Tax due with income abroad	0,00
Tax due without income abroad	0,00
Difference to be considered for tax calculation (legal limit)	0,00
03. Income Tax Withheld at Source (Law 11.033/2004):	0,00
04. Income Tax Withheld at Source for the Taxpayer	43.717,42
05. Income Tax Withheld at Source for the Dependents	0,00
06. Taxpayer's Carnê-Leão	0,00
07. Dependent's Carnê-Leão	0,00

CARNÊ-LEÃO - (Income tax that must be paid monthly, mandatorily, by individuals residing in Brazil who receive income from another individual or from abroad)

PAYMENTS MADE

(Values in Reais)

CODE	BENEFICIARY NAME	BENEFICIARY CPF/CNPJ	AMOUNT PAID	NON- DEDUCTABLE PORTION
Taxpayer				
01 Description:	FGV GETULIO VARGAS FOUNDATION	33.641.663/0001-44	9.330,44	0,00

NAME: ANTONIO DE AZEVEDO DONATTI**CPF: 061.603.489-06****ANNUAL ADJUSTMENT DECLARATION****INCOME TAX - INDIVIDUAL****TAX YEAR 2023****CALENDAR YEAR 2022****SUMMARY****TAXATION USING THE STANDARD DEDUCTION****TAXABLE INCOME AND STANDARD DEDUCTION**

Received from Legal Entity by the Taxpayer	210.009,87
Received from Legal Entity by Dependents	0,00
Received from Individual/Abroad by the Taxpayer	0,00
Received from Individual/Abroad by Dependents	0,00
Received Cumulatively by the Taxpayer	0,00
Received Cumulatively by Dependents	0,00
Taxable Income from Rural Activity	0,00
TOTAL TAXABLE INCOME	210.009,87
Standard Deduction	16.754,34
Taxable Base	193.255,53
Tax Due	42.712,95
Tax Due RRA (on received accumulated income)	0,00
Effective Tax Rate (%)	20,33
Total Tax Due	42.712,95

TAX PAID

Tax Withheld at Source by the Taxpayer	43.717,4
Tax Withheld at Source by Dependents	0,00
Taxpayer's Carnê-Leão	0,00
Dependents' Carnê-Leão	0,00
Complementary Tax	0,00
Tax Paid Abroad	0,00
Tax Withheld at Source (Law No.11.033/2004)	0,00
Tax Withheld RRA	0,00
Total Tax Paid	43.717,4

TAX TO BE REFUNDED

1.004,47

BALANCE OF TAX PAYABLE

0,00

INSTALLMENT PLAN

Installment Amount	0,00
Number of Installments	0

BANKING INFORMATION

Account Type	Checking Account
Bank	104
Branch (without Checking Digit)	1877
Account for credit	01300125915 0

ASSET EVOLUTION

Assets and Rights on 12/31/2021	224.805,27
Assets and Rights on 12/31/2022	234.114,99
Encumbrances and Real Liabilities on 12/31/2021	47.551,78
Encumbrances and Real Liabilities on 12/31/2022	43.278,50

OTHER INFORMATION

Exempt and non-taxable income	8.871,33
Income subject to exclusive/definitive taxation	13.710,86
Taxable income - tax with suspended liability	0.00
Judicial Deposits of Tax	0.00
Tax Paid on Capital Gains	0.00
Tax Paid on Capital Gains Foreign Currency - Assets, Rights, and Financial Investments	0.00
Total tax withheld at source (Law No. 11.033/2004), as per the data provided by the taxpayer	0.00
Tax Paid on Variable Income	0.00
Donations to Political Parties and Candidates for Elective Office	
Tax Payable on Capital Gain - Foreign Currency in Cash	0.00
Deferred Tax on Capital Gains	0.00
Tax Due on Capital Gains	0.00
Tax Due on Net Income from Variable Income	0.00
Tax Due on Capital Gains in Foreign Currency - Assets, Rights, and Financial Investments	0.00

I, André Vinícius Inacio Penna Mello, telephone number 415 425-2508, mailing address P.O. Box 90487, San Diego, CA 92169, certify that the professional translation of this document from Portuguese to English has been performed by myself, a qualified translator fluent in both languages, and that the following is an accurate and complete translation of the document.

Date: March 3, 2026.

NOME: ANTONIO DE AZEVEDO DONATTI**CPF: 061.603.489-06****DECLARAÇÃO DE AJUSTE ANUAL****IMPOSTO SOBRE A RENDA - PESSOA FÍSICA****EXERCÍCIO 2023****ANO-CALENDÁRIO 2022****IDENTIFICAÇÃO DO CONTRIBUINTE**

Nome: ANTONIO DE AZEVEDO DONATTI

CPF: 061.603.489-06

Data de Nascimento: 27/12/1992

Título Eleitoral:

Possui cônjuge ou companheiro(a)? Não

Houve alteração de dados cadastrais? Não

Um dos declarantes é pessoa com doença grave ou portadora de deficiência física ou mental?

Não

Endereço: RUA TENENTE SILVEIRA

Número: 600

Complemento: APTO 707

Bairro/Distrito: CENTRO

Município: FLORIANÓPOLIS

UF: SC

CEP: 88010-301

DDD/Telefone:

E-mail:

DDD/Celular:

Natureza da Ocupação: 01 - EMPREGADO DE EMPRESA DO SETOR PRIVADO, EXCETO DE INSTITUIÇÕES FINANCEIRAS

Ocupação Principal: 319 - OUTROS TÉCNICOS DE NÍVEL MÉDIO DAS CIÊNCIAS FÍSICAS, QUÍMICAS, ENGENHARIA E AFINS

Tipo de declaração: Declaração de Ajuste Anual Original

Nº do recibo da última declaração entregue do exercício de 2022: 01.06.36.22.23-90

DEPENDENTES

Sem Informações

ALIMENTANDOS

Sem Informações

RENDIMENTOS TRIBUTÁVEIS RECEBIDOS DE PESSOA JURÍDICA PELO TITULAR

(Valores em Reais)

NOME DA FONTE PAGADORA	REND. RECEBIDOS DE PES. JURÍDICA	CONTR. PREVID. OFICIAL	IMPOSTO RETIDO NA FONTE	13º SALÁRIO	IRRF SOBRE 13º SALÁRIO
EMS CONSULTORIA ASSESSORIA E EVENTOS LTDA CNPJ/CPF: 04.419.865/0001-48	210.009,87	9.940,56	43.717,42	13.710,86	4.001,56
TOTAL	210.009,87	9.940,56	43.717,42	13.710,86	4.001,56

RENDIMENTOS TRIBUTÁVEIS RECEBIDOS DE PESSOA JURÍDICA PELOS DEPENDENTES

Sem Informações

RENDIMENTOS TRIBUTÁVEIS RECEBIDOS DE PESSOA FÍSICA E DO EXTERIOR PELO TITULAR

Sem Informações

RENDIMENTOS TRIBUTÁVEIS RECEBIDOS DE PESSOA FÍSICA E DO EXTERIOR PELOS DEPENDENTES

Sem Informações

RENDIMENTOS ISENTOS E NÃO TRIBUTÁVEIS

(Valores em Reais)

12. Rendimentos de cadernetas de poupança, letras hipotecárias, letras de crédito do agronegócio e imobiliário (LCA e LCI) e certificados de recebíveis do agronegócio e imobiliários (CRA e CRI) 0,42

Beneficiário	CPF	CNPJ da Fonte Pagadora	Nome da Fonte Pagadora	Valor
Titular	061.603.489-06	00.360.305/0001-04	CEF	0,42

99. Outros 8.870,91

NOME: ANTONIO DE AZEVEDO DONATTI**CPF: 061.603.489-06****DECLARAÇÃO DE AJUSTE ANUAL****IMPOSTO SOBRE A RENDA - PESSOA FÍSICA****EXERCÍCIO 2023****ANO-CALENDÁRIO 2022**

Beneficiário	CPF	CPF/CNPJ da Fonte Pagadora	Nome da Fonte Pagadora	Descrição	Valor
Titular	061.603.489-06	04.419.865/0001-48	EMS CONSULTORIA ASSESSORIA E EVENTOS LTDA	ABONO	8.870,91

TOTAL 8.871,33**RENDIMENTOS SUJEITOS À TRIBUTAÇÃO EXCLUSIVA / DEFINITIVA** (Valores em Reais)

01. 13º salário 13.710,86

TOTAL 13.710,86**RENDIMENTOS TRIBUTÁVEIS RECEBIDOS DE PESSOA JURÍDICA PELO TITULAR (IMPOSTO COM EXIGIBILIDADE SUSPensa)**

Sem Informações

RENDIMENTOS TRIBUTÁVEIS RECEBIDOS DE PESSOA JURÍDICA PELOS DEPENDENTES (IMPOSTO COM EXIGIBILIDADE SUSPensa)

Sem Informações

RENDIMENTOS TRIBUTÁVEIS DE PESSOA JURÍDICA RECEBIDOS ACUMULADAMENTE PELO TITULAR

Sem Informações

RENDIMENTOS TRIBUTÁVEIS DE PESSOA JURÍDICA RECEBIDOS ACUMULADAMENTE PELOS DEPENDENTES

Sem Informações

IMPOSTO PAGO / RETIDO (Valores em Reais)

01. Imposto complementar: 0,00

02. Imposto pago no exterior 0,00

Imposto devido com os rendimentos no exterior: 0,00

Imposto devido sem os rendimentos no exterior: 0,00

Diferença a ser considerada para cálculo do imposto (limite legal): 0,00

03. Imposto de renda na fonte (Lei 11.033/2004): 0,00

04. Imposto retido na fonte do titular 43.717,42

05. Imposto retido na fonte dos dependentes 0,00

06. Carnê-Leão do titular 0,00

07. Carnê-Leão dos dependentes 0,00

PAGAMENTOS EFETUADOS (Valores em Reais)

CÓD.	NOME DO BENEFICIÁRIO	CPF/CNPJ DO BENEFICIÁRIO	VALOR PAGO	PARC. NÃO DEDUTÍVEL
Titular				
01	FGV FUNDACAO GETULIO VARGAS	33.641.663/0001-44	9.330,44	0,00
Descrição:				

NOME: ANTONIO DE AZEVEDO DONATTI**CPF: 061.603.489-06****DECLARAÇÃO DE AJUSTE ANUAL****IMPOSTO SOBRE A RENDA - PESSOA FÍSICA****EXERCÍCIO 2023****ANO-CALENDÁRIO 2022****RESUMO****TRIBUTAÇÃO UTILIZANDO O DESCONTO SIMPLIFICADO****RENDIMENTOS TRIBUTÁVEIS E DESCONTO SIMPLIFICADO**

Recebidos de Pessoa Jurídica pelo Titular	210.009,87
Recebidos de Pessoa Jurídica pelos Dependentes	0,00
Recebidos de Pessoa Física/Exterior pelo Titular	0,00
Recebidos de Pessoa Física/Exterior pelos Dependentes	0,00
Recebidos acumuladamente pelo titular	0,00
Recebidos acumuladamente pelos dependentes	0,00
Resultado tributável da Atividade Rural	0,00
TOTAL DE RENDIMENTOS TRIBUTÁVEIS	210.009,87
Desconto Simplificado	16.754,34
Base de cálculo do Imposto	193.255,53
Imposto devido	42.712,95
Imposto devido RRA	0,00
Alíquota efetiva (%)	20,33
Total do imposto devido	42.712,95

IMPOSTO PAGO

Imposto retido na fonte do titular	43.717,42
Imp. retido na fonte dos dependentes	0,00
Carnê-Leão do titular	0,00
Carnê-Leão dos dependentes	0,00
Imposto Complementar	0,00
Imposto pago no exterior	0,00
Imposto retido na fonte (Lei nº 11.033/2004)	0,00
Imposto retido RRA	0,00
Total do imposto pago	43.717,42

IMPOSTO A RESTITUIR

1.004,47

SALDO IMPOSTO A PAGAR

0,00

PARCELAMENTO

Valor da quota	0,00
Número de Quotas	0

INFORMAÇÕES BANCÁRIAS

Tipo de Conta	Conta Poupança
Banco	104
Agência (sem DV)	1877
Conta para crédito	01300125915 0

NOME: ANTONIO DE AZEVEDO DONATTI

CPF: 061.603.489-06

DECLARAÇÃO DE AJUSTE ANUAL

IMPOSTO SOBRE A RENDA - PESSOA FÍSICA

EXERCÍCIO 2023

ANO-CALENDÁRIO 2022

EVOLUÇÃO PATRIMONIAL

Bens e direitos em 31/12/2021	224.805,27
Bens e direitos em 31/12/2022	234.114,99
Dívidas e ônus reais em 31/12/2021	47.551,78
Dívidas e ônus reais em 31/12/2022	43.278,50

OUTRAS INFORMAÇÕES

Rendimentos isentos e não tributáveis	8.871,33
Rendimentos sujeitos à tributação exclusiva/definitiva	13.710,86
Rendimentos tributáveis - imposto com exigibilidade suspensa	0,00
Depósitos judiciais do imposto	0,00
Imposto pago sobre Ganhos de Capital	0,00
Imposto pago Ganhos de Capital Moeda Estrangeira - Bens, direitos e Aplicações Financeiras	0,00
Total do imposto retido na fonte (Lei nº11.033/2004), conforme dados informados pelo contribuinte	0,00
Imposto pago sobre Renda Variável	0,00
Doações a Partidos Políticos e Candidatos a Cargos Eletivos	
Imposto a pagar sobre o Ganho de Capital - Moeda Estrangeira em Espécie	0,00
Imposto diferido dos Ganhos de Capital	0,00
Imposto devido sobre Ganhos de Capital	0,00
Imposto devido sobre ganhos líquidos em Renda Variável	0,00
Imposto devido sobre Ganhos de Capital Moeda Estrangeira - Bens, direitos e aplic. financeiras	0,00

NAME: ANTONIO DE AZEVEDO DONATTI		INCOME TAX - INDIVIDUAL	
CPF: 061.603.489-06		TAX YEAR 2024	
ANNUAL ADJUSTMENT DECLARATION		CALENDAR YEAR 2023	

TAXPAYER IDENTIFICATION

Name:	ANTONIO DE AZEVEDO DONATTI	CPF:	061.603.489-06
Date of Birth:	12/27/1992	Voter ID:	
Do you have a spouse or partner?	No		
Were you a resident abroad and became a resident in Brazil in 2023?	No		
Were there any changes to the registration details?	No		
Is one of the declarants a person with a serious illness or a physical or mental disability?	No		
Address:	RUA TENENTE SILVEIRA	Number:	600
Unit:	APT. 707	Neighborhood/District:	CENTRO
City:	FLORIANÓPOLIS	State:	SC
ZIP Code:	88010-301	Area Code/Telephone:	
Email:		Area Code/Mobile:	
Occupation Type:	01 - EMPLOYEE OF A PRIVATE SECTOR COMPANY, EXCEPT FINANCIAL INSTITUTIONS		
Main Occupation:	319 - OTHER MID-LEVEL TECHNICIANS IN PHYSICAL AND CHEMICAL SCIENCES, ENGINEERING AND RELATED FIELDS		
Type of Declaration:	Amended Declaration		
Receipt Number of the last declaration filed in the 2024 tax year:	17.00.42.63.58-44		

DEPENDENTS

No Information

ALIMONY RECIPIENTS

No Information

TAXABLE INCOME RECEIVED FROM LEGAL ENTITY BY THE TAXPAYER					(Values in Reais)
NAME OF THE PAYING SOURCE	INCOME RECEIVED FROM LEGAL ENTITY	OFFICIAL SOCIAL SECURITY CONTRIBUTION	WITHHELD TAX	13 th SALARY	INCOME TAX WITHHELD ON 13 th SALARY
EMS CONSULTORIA ASSESSORIA E EVENTOS LTDA	259.184,70	11.401,43	55.757,24	14.277,30	4.194,89
CNPJ/CPF: 04.522.600/0001-70					
TOTAL	259.184,70	11.401,43	55.757,24	14.277,30	4.194,89

TAXABLE INCOME RECEIVED FROM LEGAL ENTITY BY DEPENDENTS

No information

TAXABLE INCOME RECEIVED FROM INDIVIDUALS AND ABROAD BY THE TAXPAYER

No information

TAXABLE INCOME RECEIVED FROM INDIVIDUALS AND ABROAD BY DEPENDENTS

No information

NAME: ANTONIO DE AZEVEDO DONATTI

CPF: 061.603.489-06

ANNUAL ADJUSTMENT DECLARATION

INCOME TAX - INDIVIDUAL

TAX YEAR 2024

CALENDAR YEAR 2023

SUMMARY

TAXATION USING THE STANDARD DEDUCTION

TAXABLE INCOME AND STANDARD DEDUCTION

Received from Legal Entity by the Taxpayer	259.184,70
Received from Legal Entity by Dependents	0,00
Received from Individual/Abroad by the Taxpayer	0,00
Received from Individual/Abroad by Dependents	0,00
Received Cumulatively by the Taxpayer	0,00
Received Cumulatively by Dependents	0,00
Taxable Income from Rural Activity	0,00
TOTAL TAXABLE INCOME	259.184,70
Standard Deduction	16.754,34
Taxable Base	242.430,36
Tax Due	56.111,21
Tax Due RRA (on received accumulated income)	0,00
Effective Tax Rate (%)	21,64
Total Tax Due	56.111,21

TAX PAID

Tax Withheld at Source by the Taxpayer	55.757,24
Tax Withheld at Source by Dependents	0,00
Taxpayer's Carnê-Leão	0,00
Dependents' Carnê-Leão	0,00
Complementary Tax	0,00
Tax Paid Abroad	0,00
Tax Withheld at Source (Law No.11.033/2004)	0,00
Tax Withheld RRA	0,00
Total Tax Paid	55.757,24

TAX TO BE REFUNDED

0,00

BALANCE OF TAX PAYABLE

353,97

INSTALLMENT PLAN

Installment Amount	353,97
Number of Installments	1

BANKING INFORMATION

Automatic debit: NO

Bank

Branch (without Checking Digit)

Account for credit

NAME: ANTONIO DE AZEVEDO DONATTI

CPF: 061.603.489-06

ANNUAL ADJUSTMENT DECLARATION

INCOME TAX - INDIVIDUAL

TAX YEAR 2024

CALENDAR YEAR 2023

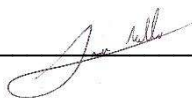
ASSET EVOLUTION

Assets and Rights on 12/31/2021	234.114,99
Assets and Rights on 12/31/2022	305.562,68
Encumbrances and Real Liabilities on 12/31/2021	43.278,50
Encumbrances and Real Liabilities on 12/31/2022	38.236,35

OTHER INFORMATION

Exempt and non-taxable income	2.357,52
Income subject to exclusive/definitive taxation	14.277,30
Taxable income - tax with suspended liability	0.00
Judicial Deposits of Tax	0.00
Tax Paid on Capital Gains	0.00
Tax Paid on Capital Gains Foreign Currency - Assets, Rights, and Financial Investments	0.00
Total tax withheld at source (Law No. 11.033/2004), as per the data provided by the taxpayer	0.00
Tax Paid on Variable Income	0.00
Donations to Political Parties and Candidates for Elective Office	
Tax Payable on Capital Gain - Foreign Currency in Cash	0.00
Deferred Tax on Capital Gains	0.00
Tax Due on Capital Gains	0.00
Tax Due on Net Income from Variable Income	0.00
Tax Due on Capital Gains in Foreign Currency - Assets, Rights, and Financial Investments	0.00

I, André Vinícius Inacio Penna Mello, telephone number 415 425-2508, mailing address P.O. Box 90487, San Diego, CA 92169, certify that the professional translation of this document from Portuguese to English has been performed by myself, a qualified translator fluent in both languages, and that the following is an accurate and complete translation of the document.



Date: March 3, 2026.

IDENTIFICAÇÃO DO CONTRIBUINTE

Nome:

ANTONIO DE AZEVEDO DONATTI

CPF:

061.603.489-06

Data de Nascimento:

27/12/1992

Título Eleitoral:

Possui cônjuge ou companheiro(a)?

Não

Era residente no exterior e passou a ser residente no Brasil em 2023?

Não

Houve alteração de dados cadastrais?

Não

Um dos declarantes é pessoa com doença grave ou portadora de deficiência física ou mental?

Não

Endereço:

RUA TENENTE SILVEIRA

Número:

600

Complemento:

APTO 707

Bairro/Distrito:

CENTRO

Município:

FLORIANÓPOLIS

UF:

SC

CEP:

88010-301

DDD/Telefone:

E-mail:

DDD/Celular:

Natureza da Ocupação:

01 - EMPREGADO DE EMPRESA DO SETOR PRIVADO, EXCETO DE INSTITUIÇÕES FINANCEIRAS

Ocupação Principal:

319 - OUTROS TÉCNICOS DE NÍVEL MÉDIO DAS CIÊNCIAS FÍSICAS, QUÍMICAS, ENGENHARIA E AFINS

Tipo de declaração:

Declaração Retificadora

Nº do recibo da declaração anterior do exercício de 2024:

17.00.42.63.58-44

DEPENDENTES

Sem Informações

ALIMENTANDOS

Sem Informações

RENDIMENTOS TRIBUTÁVEIS RECEBIDOS DE PESSOA JURÍDICA PELO TITULAR					(Valores em Reais)
NOME DA FONTE PAGADORA	REND. RECEBIDOS DE PES. JURÍDICA	CONTR. PREVID. OFICIAL	IMPOSTO RETIDO NA FONTE	13º SALÁRIO	IRRF SOBRE 13º SALÁRIO
EMS CONSULTORIA ASSESSORIA E EVENTOS LTDA CNPJ/CPF: 04.419.865/0001-48	259.184,70	11.401,43	55.757,24	14.277,30	4.194,89
TOTAL	259.184,70	11.401,43	55.757,24	14.277,30	4.194,89

RENDIMENTOS TRIBUTÁVEIS RECEBIDOS DE PESSOA JURÍDICA PELOS DEPENDENTES

Sem Informações

RENDIMENTOS TRIBUTÁVEIS RECEBIDOS DE PESSOA FÍSICA E DO EXTERIOR PELO TITULAR

Sem Informações

RENDIMENTOS TRIBUTÁVEIS RECEBIDOS DE PESSOA FÍSICA E DO EXTERIOR PELOS DEPENDENTES

Sem Informações

Página 353

RESUMO

TRIBUTAÇÃO UTILIZANDO O DESCONTO SIMPLIFICADO

RENDIMENTOS TRIBUTÁVEIS E DESCONTO SIMPLIFICADO	
Recebidos de Pessoa Jurídica pelo Titular	259.184,70
Recebidos de Pessoa Jurídica pelos Dependentes	0,00
Recebidos de Pessoa Física/Exterior pelo Titular	0,00
Recebidos de Pessoa Física/Exterior pelos Dependentes	0,00
Recebidos acumuladamente pelo titular	0,00
Recebidos acumuladamente pelos dependentes	0,00
Resultado tributável da Atividade Rural	0,00
TOTAL DE RENDIMENTOS TRIBUTÁVEIS	259.184,70
Desconto Simplificado	16.754,34
Base de cálculo do Imposto	242.430,36
Imposto devido	56.111,21
Imposto devido RRA	0,00
Alíquota efetiva (%)	21,64
Total do imposto devido	56.111,21
IMPOSTO PAGO	
Imposto retido na fonte do titular	55.757,24
Imp. retido na fonte dos dependentes	0,00
Carnê-Leão do titular	0,00
Carnê-Leão dos dependentes	0,00
Imposto Complementar	0,00
Imposto pago no exterior	0,00
Imposto retido na fonte (Lei nº 11.033/2004)	0,00
Imposto retido RRA	0,00
Total do imposto pago	55.757,24
IMPOSTO A RESTITUIR	0,00
SALDO IMPOSTO A PAGAR	353,97
PARCELAMENTO	
Valor da quota	353,97
Número de Quotas	1
INFORMAÇÕES BANCÁRIAS	
Débito automático: NÃO	
Banco	
Agência (sem DV)	
Conta para débito	

EVOLUÇÃO PATRIMONIAL

Bens e direitos em 31/12/2022	234.114,99
Bens e direitos em 31/12/2023	305.562,68
Dívidas e ônus reais em 31/12/2022	43.278,50
Dívidas e ônus reais em 31/12/2023	38.236,35

OUTRAS INFORMAÇÕES

Rendimentos isentos e não tributáveis	2.357,52
Rendimentos sujeitos à tributação exclusiva/definitiva	14.277,30
Rendimentos tributáveis - imposto com exigibilidade suspensa	0,00
Depósitos judiciais do imposto	0,00
Imposto pago sobre Ganhos de Capital	0,00
Imposto pago Ganhos de Capital Moeda Estrangeira - Bens, direitos e Aplicações Financeiras	0,00
Total do imposto retido na fonte (Lei nº11.033/2004), conforme dados informados pelo contribuinte	0,00
Imposto pago sobre Renda Variável	0,00
Doações a Partidos Políticos e Candidatos a Cargos Eletivos	
Imposto a pagar sobre o Ganho de Capital - Moeda Estrangeira em Espécie	0,00
Imposto diferido dos Ganhos de Capital	0,00
Imposto devido sobre Ganhos de Capital	0,00
Imposto devido sobre ganhos líquidos em Renda Variável	0,00
Imposto devido sobre Ganhos de Capital Moeda Estrangeira - Bens, direitos e aplic. financeiras	0,00

TAXPAYER IDENTIFICATION

Name:

ANTONIO DE AZEVEDO DONATTI

CPF:

061.603.489-06

Date of Birth:

12/27/1992

Voter ID:

Do you have a spouse or partner?

No

Were you a resident abroad and became a resident in Brazil in 2024?

No

Were there any changes to the registration details?

No

Is one of the declarants a person with a serious illness or a physical or mental disability?

No

Address:

RUA TENENTE SILVEIRA

Number:

600

Unit:

APT. 707

Neighborhood/District:

CENTRO

City:

FLORIANÓPOLIS

State:

SC

ZIP Code:

88010-301

Area Code/Telephone:

Email:

Area Code/Mobile:

Occupation Type:

01 - EMPLOYEE OF A PRIVATE SECTOR COMPANY, EXCEPT FINANCIAL INSTITUTIONS

Main Occupation:

319 - OTHER MID-LEVEL TECHNICIANS IN PHYSICAL AND CHEMICAL SCIENCES, ENGINEERING AND RELATED FIELDS

Type of Declaration:

Amended Declaration

Receipt Number of the last declaration filed in the 2025 tax year:

20.06.08.28.46-35

DEPENDENTS

No Information

ALIMONY RECIPIENTS

No Information

TAXABLE INCOME RECEIVED FROM LEGAL ENTITY BY THE TAXPAYER					(Values in Reais)
NAME OF THE PAYING SOURCE	INCOME RECEIVED FROM LEGAL ENTITY	OFFICIAL SOCIAL SECURITY CONTRIBUTION	WITHHELD TAX	13 th SALARY	INCOME TAX WITHHELD ON 13 th SALARY
EMS CONSULTORIA ASSESSORIA E EVENTOS LTDA	213.494,78	1.029,25	46.105,77	14.614,30	4.307,49
CNPJ/CPF: 04.522.600/0001-70					
TOTAL	213.494,78	1.029,25	46.105,77	14.614,30	4.307,49

TAXABLE INCOME RECEIVED FROM LEGAL ENTITY BY DEPENDENTS

No information

TAXABLE INCOME RECEIVED FROM INDIVIDUALS AND ABROAD BY THE TAXPAYER

No information

TAXABLE INCOME RECEIVED FROM INDIVIDUALS AND ABROAD BY DEPENDENTS

No information

NAME: ANTONIO DE AZEVEDO DONATTI

CPF: 061.603.489-06

ANNUAL ADJUSTMENT DECLARATION

INCOME TAX - INDIVIDUAL

TAX YEAR 2025

CALENDAR YEAR 2024

SUMMARY

TAXATION USING THE STANDARD DEDUCTION

TAXABLE INCOME AND STANDARD DEDUCTION

Received from Legal Entity by the Taxpayer	213.494,78
Received from Legal Entity by Dependents	0,00
Received from Individual/Abroad by the Taxpayer	0,00
Received from Individual/Abroad by Dependents	0,00
Received Cumulatively by the Taxpayer	0,00
Received Cumulatively by Dependents	0,00
Taxable Income from Rural Activity	0,00
TOTAL TAXABLE INCOME	213.494,78
Standard Deduction	16.754,34
Taxable Base	196.740,44
Tax Due	43.362,64
Tax Due RRA (on received accumulated income)	0,00
Effective Tax Rate (%)	20,31
Total Tax Due	43.362,64

TAX PAID

Tax Withheld at Source by the Taxpayer	46.105,77
Tax Withheld at Source by Dependents	0,00
Taxpayer's Carnê-Leão	0,00
Dependents' Carnê-Leão	0,00
Complementary Tax	0,00
Tax Paid Abroad	0,00
Tax Withheld at Source (Law No.11.033/2004)	0,00
Tax Withheld RRA	0,00
Total Tax Paid	46.105,77

TAX TO BE REFUNDED

2.743,13

BALANCE OF TAX PAYABLE

0,00

INSTALLMENT PLAN

Installment Amount	0,00
Number of Installments	0

BANKING INFORMATION

Account Type	Pix
Bank	
Branch (without Checking Digit)	
Account for credit	

NAME: ANTONIO DE AZEVEDO DONATTI

CPF: 061.603.489-06

ANNUAL ADJUSTMENT DECLARATION

INCOME TAX - INDIVIDUAL

TAX YEAR 2025

CALENDAR YEAR 2024

ASSET EVOLUTION

Assets and Rights on 12/31/2021	306.762,68
Assets and Rights on 12/31/2022	363.278,96
Encumbrances and Real Liabilities on 12/31/2021	38.236,35
Encumbrances and Real Liabilities on 12/31/2022	0,00

OTHER INFORMATION

Exempt and non-taxable income	1.821,97
Income subject to exclusive/definitive taxation	15.827,62
Taxable income - tax with suspended liability	0.00
Judicial Deposits of Tax	0.00
Tax Paid on Capital Gains	0.00
Tax Paid on Capital Gains Foreign Currency - Assets, Rights, and Financial Investments	0.00
Total tax withheld at source (Law No. 11.033/2004), as per the data provided by the taxpayer	0.00
Tax Paid on Variable Income	0.00
Donations to Political Parties and Candidates for Elective Office	
Tax Payable on Capital Gain - Foreign Currency in Cash	0.00
Deferred Tax on Capital Gains	0.00
Tax Due on Capital Gains	0.00
Tax Due on Net Income from Variable Income	0.00
Tax Due on Capital Gains in Foreign Currency - Assets, Rights, and Financial Investments	0.00

I, André Vinícius Inacio Penna Mello, telephone number 415 425-2508, mailing address P.O. Box 90487, San Diego, CA 92169, certify that the professional translation of this document from Portuguese to English has been performed by myself, a qualified translator fluent in both languages, and that the following is an accurate and complete translation of the document.

Date: March 3, 2026.

IDENTIFICAÇÃO DO CONTRIBUINTE

Nome:

ANTONIO DE AZEVEDO DONATTI

CPF:

061.603.489-06

Data de Nascimento:

27/12/1992

Possui cônjuge ou companheiro(a)?

Não

Era residente no exterior e passou a ser residente no Brasil em 2024?

Não

Houve alteração de dados cadastrais?

Não

Um dos declarantes é pessoa com doença grave ou portadora de deficiência física ou mental?

Não

Endereço:

RUA TENENTE SILVEIRA

Número:

600

Complemento:

APTO 707

Bairro/Distrito:

CENTRO

Município:

FLORIANÓPOLIS

UF:

SC

CEP:

88010-301

DDD/Telefone:

E-mail:

DDD/Celular:

Natureza da Ocupação:

01 - EMPREGADO DE EMPRESA DO SETOR PRIVADO, EXCETO DE INSTITUIÇÕES FINANCEIRAS

Ocupação Principal:

319 - OUTROS TÉCNICOS DE NÍVEL MÉDIO DAS CIÊNCIAS FÍSICAS, QUÍMICAS, ENGENHARIA E AFINS

Tipo de declaração:

Declaração Retificadora

Nº do recibo da declaração anterior do exercício de 2025:

20.06.08.28.46-35

DEPENDENTES

Sem Informações

ALIMENTANDOS

Sem Informações

RENDIMENTOS TRIBUTÁVEIS RECEBIDOS DE PESSOA JURÍDICA PELO TITULAR (Valores em Reais)

NOME DA FONTE PAGADORA	REND. RECEBIDOS DE PES. JURÍDICA	CONTR. PREVID. OFICIAL	IMPOSTO RETIDO NA FONTE	13º SALÁRIO	IRRF SOBRE 13º SALÁRIO
EMS CONSULTORIA ASSESSORIA E EVENTOS LTDA CNPJ/CPF: 04.419.865/0001-48	213.494,78	1.029,25	46.105,77	14.614,30	4.307,49
TOTAL	213.494,78	1.029,25	46.105,77	14.614,30	4.307,49

RENDIMENTOS TRIBUTÁVEIS RECEBIDOS DE PESSOA JURÍDICA PELOS DEPENDENTES

Sem Informações

RENDIMENTOS TRIBUTÁVEIS RECEBIDOS DE PESSOA FÍSICA E DO EXTERIOR PELO TITULAR

Sem Informações

RENDIMENTOS TRIBUTÁVEIS RECEBIDOS DE PESSOA FÍSICA E DO EXTERIOR PELOS DEPENDENTES

Sem Informações

Página 359

RESUMO

TRIBUTAÇÃO UTILIZANDO O DESCONTO SIMPLIFICADO

RENDIMENTOS TRIBUTÁVEIS E DESCONTO SIMPLIFICADO

Recebidos de Pessoa Jurídica pelo Titular	213.494,78
Recebidos de Pessoa Jurídica pelos Dependentes	0,00
Recebidos de Pessoa Física/Exterior pelo Titular	0,00
Recebidos de Pessoa Física/Exterior pelos Dependentes	0,00
Recebidos acumuladamente pelo titular	0,00
Recebidos acumuladamente pelos dependentes	0,00
Resultado tributável da Atividade Rural	0,00
TOTAL DE RENDIMENTOS TRIBUTÁVEIS	213.494,78
Desconto Simplificado	16.754,34
Base de cálculo do Imposto	196.740,44
Imposto devido	43.362,64
Imposto devido RRA	0,00
Alíquota efetiva (%)	20,31
Total do imposto devido	43.362,64

IMPOSTO PAGO

Imposto retido na fonte do titular	46.105,77
Imp. retido na fonte dos dependentes	0,00
Carnê-Leão do titular	0,00
Carnê-Leão dos dependentes	0,00
Imposto Complementar	0,00
Imposto pago no exterior	0,00
Imposto retido na fonte (Lei nº 11.033/2004)	0,00
Imposto retido RRA	0,00
Total do imposto pago	46.105,77

IMPOSTO A RESTITUIR

2.743,13

SALDO IMPOSTO A PAGAR

0,00

PARCELAMENTO

Valor da quota	0,00
Número de Quotas	0

INFORMAÇÕES BANCÁRIAS

Tipo de Conta	Pix
Banco	
Agência (sem DV)	
Conta para crédito	

EVOLUÇÃO PATRIMONIAL

Bens e direitos em 31/12/2023	306.762,68
Bens e direitos em 31/12/2024	363.278,96
Dívidas e ônus reais em 31/12/2023	38.236,35
Dívidas e ônus reais em 31/12/2024	0,00

OUTRAS INFORMAÇÕES

Rendimentos isentos e não tributáveis	1.821,97
Rendimentos sujeitos à tributação exclusiva/definitiva	15.827,62
Rendimentos tributáveis - imposto com exigibilidade suspensa	0,00
Depósitos judiciais do imposto	0,00
Imposto pago sobre Ganhos de Capital	0,00
Imposto pago Ganhos de Capital Moeda Estrangeira - Bens, direitos e Aplicações Financeiras	0,00
Total do imposto retido na fonte (Lei nº11.033/2004), conforme dados informados pelo contribuinte	0,00
Imposto pago sobre Renda Variável	0,00
Doações a Partidos Políticos e Candidatos a Cargos Eletivos	
Imposto a pagar sobre o Ganho de Capital - Moeda Estrangeira em Espécie	0,00
Imposto diferido dos Ganhos de Capital	0,00
Imposto devido sobre Ganhos de Capital	0,00
Imposto devido sobre ganhos líquidos em Renda Variável	0,00
Imposto devido sobre Ganhos de Capital Moeda Estrangeira - Bens, direitos e aplic. financeiras	0,00

ACCOUNTING STATEMENT

ARNOLDO CESAR CHEQUETTO

Accountant - Holder of AC CON CONTABILIDADE SS LTDA

CNPJ No. 05.070.278/0001-59

CRC (*Regional Accounting Council registration*) No. 006071/O-4

Address: Rua Charles Ferrari, 500 Room 402 - Kobrasol - São José - Santa Catarina – ZIP Code 88.102-050

I, Arnaldo Cesar Chequetto, accountant, holder of AC CON Contabilidade SS Ltda, registered in the National Register of Legal Entities (CNPJ) under No. 05.070.278/001-59, hereby declare, for all due purposes, that Mr. **Antonio de Azevedo Donatti**, Brazilian, married, holder of CPF No. 06160348906, has, based on the income tax declarations of the last five years, an annual income of:

- **In 2020:** \$100,112.60, derived from the provision of services, with employment income
- **In 2021:** \$164,640.15, derived from the provision of services, with employment income.
- **In 2022:** \$210,009.87, derived from the provision of services, with employment income.
- **In 2023:** R\$259,184.70, derived from the provision of services, with employment income.
- **In 2024:** R\$213,494.78, derived from the provision of services, with employment income.

The amounts stated above are duly recorded in the Personal Income Tax (IRPF) and reflect the income declarations submitted by Mr. Antonio de Azevedo Donatti to the competent authorities.

We remain at your disposal for any additional clarifications that may be required.

Sincerely,

-----//Signature//-----

Arnoldo Cesar Chequetto

CRC/SC 010958 O 0

I, Carolina Favero da Silva, telephone number 415 425-2508, mailing address P.O. Box 90487, San Diego, CA 92169, certify that the professional translation of this document from Portuguese to English has been performed by myself, a qualified translator fluent in both languages, and that the following is an accurate and complete translation of the document.



Date: March 2, 2026.

DECLARAÇÃO CONTÁBIL

ARNOLDO CESAR CHEQUETTO

Contador – Titular da AC CON CONTABILIDADE SS LTDA

CNPJ nº 05.070.278/0001-59

CRC nº 006071/O-4

Endereço: Rua Charles Ferrari, 500 sala 402 – Kobrasol – São José – SC – Cep 88.102-050

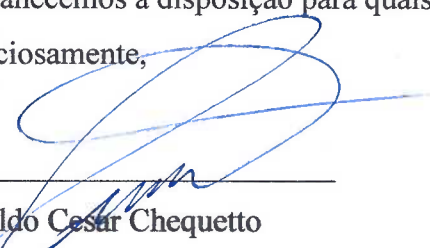
Eu, Arnaldo Cesar Chequetto, contador, titular da AC CON Contabilidade SS Ltda, inscrito no Cadastro Nacional da Pessoa Jurídica (CNPJ) sob o nº 05.070.278/001-59, declaro, para os devidos fins, que o Sr. **Antonio de Azevedo Donatti**, brasileiro, casado, portador do CPF nº 06160348906, possui com base na declaração de imposto de renda dos últimos 05 anos uma renda anual de:

- **Em 2020:** R\$ 100.112,60, provenientes de prestação de serviços, com rendimentos de trabalho assalariado
- **Em 2021:** R\$ 164.640,15, provenientes de prestação de serviços, com rendimentos de trabalho assalariado.
- **Em 2022:** R\$ 210.009,87, provenientes de prestação de serviços, com rendimentos de trabalho assalariado.
- **Em 2023:** R\$ 259.184,70, provenientes de prestação de serviços, com rendimentos de trabalho assalariado.
- **Em 2024:** R\$ 213.494,78, provenientes de prestação de serviços, com rendimentos de trabalho assalariado.

Os valores acima informados encontram-se devidamente registrados no IRPF e refletem as declarações de rendimentos apresentadas pelo Sr. Antônio de Azevedo Donatti perante os órgãos competentes.

Permanecemos à disposição para quaisquer esclarecimentos adicionais que se façam necessários.

Atenciosamente,



Arnaldo Cesar Chequetto

CRC/SC 010958 O 0

Rua Charles Ferrari, 500 - Ed. Quefren Executive's Center - Sala 402/403 - Kobrasol - CEP 88102-050 - São José - SC

Fone/Fax (48) 259 - 5000 - Fax: (48) 3035-5999

E-mail: acon@acontabil.com.br aconcontabilidade@hotmail.com

Service Delivery Manager Salaries (Brazil) ⓘ

Experience

All the years of experience

▼

Base salary

R\$ 8,000 - R\$ 17,000 / month

Average base salary of R\$ 13,000 / month

Variable compensation ⓘ

Average of R\$1,000 / month

R\$ 563 - R\$ 3,000 / month Range

**Exhibit C.III – Third
Prong – Waiver of Job
Offer and Labor
Certification**

**Please refer to all documents of
Exhibit C.I and Exhibit C.II**

Exhibit D - Personal Documents

FEDERATIVE REPUBLIC OF BRAZIL
CIVIL REGISTRY OF NATURAL PERSONSFEDERATIVE REPUBLIC OF BRAZIL
CIVIL REGISTRY OF NATURAL PERSONS

2nd COPY

BIRTH CERTIFICATE

Name

ANTONIO DE AZEVEDO DONATTI

CPF

061.603.489-06

Registration

106591 01 55 1992 1 00036 136 0010292 11

Date of birth

December twenty-seventh, nineteen ninety-two

Day

27

Month

12

Year

1992

Time of birth

08:50 AM

Municipality of birth

Florianópolis

State

SC

Place of birth

Dr. Carlos Corrêa Maternity

City of Birth

Florianópolis

State

SC

Sex

Male

Parent's name

Neuri Vilson Donatti

City of birth

No record

State

RS

Respective Grandparents

Alexio Donatti; Élia Maria Caovilla Donatti

Parent's name

Maria Cristina Borba de Azevedo Donatti

Municipality of birth

No record

State

RS

Respective Grandparents

Antonio Moacyr de Azevedo; Maria Selma Borba de Azevedo

Registration Date

December thirtieth, nineteen ninety-two

DNV (NUMBER OF LIVE BIRTH CERTIFICATE)

No record

Notes/Annotations

NOTE: Under the terms of Administrative Ruling No. 63/2017 of the National Council of Justice, the CPF of the registrant is hereby included under No. 061.603.489-06. (Consultation carried out at the Civil Registry Center - CRC). Trindade, 06/26/2021. Juliana Iracet da Silva - Clerk.

CNS No. 10.659-1

Justice of the Peace Office of the 4th Subdistrict of Trindade
Florianópolis - Santa Catarina

Maria Alice Costa da Silva

Registrar

Rua Lauro Linhares, No. 1849, 1st floor, Trindade Neighborhood

88.036-003 - Florianópolis - Santa Catarina

(48) 3234-0003

The content of the certificate is true. I certify.
Florianópolis/Santa Catarina, January 2, 2026.Juliana Iracet da Silva
ClerkFees: Birth certificate: R\$ 39.98; ISS: R\$ 1.99;
FRJ: R\$ 9.08; Regular seal (HRM52894-6VQU)
Total: R\$ 51.05Judiciary
State of Santa Catarina
Electronic Inspection Seal
Regular seal

HRM52894-6VQU

Check the act details at:
www.tjsc.jus.br/selo

Electronically signed by: Juliana Iracet da Silva - 01/02/2026 3:57:40 MM, pursuant to Article 19 of Law No. 6,015/73, and Article 228-F of the National Code of Norms of the Judicial Administrative Department of the National Council of Justice - Extrajudicial Forum (CNN/CNJ-Extra)
CNS (Civil Registry Number): 106591 - SC - Florianópolis - 4th Subdistrict
Validation: <https://certidao.registrocivil.org.br/validar> Validation Code y2ge-53d6
[Click here](#) to validate the certificate

SERP: Electronic System for the Registration of Persons / RCPN: Civil Registry of Natural Persons

I, Carolina Favero da Silva, telephone number 415 425-2508, mailing address P.O. Box 90487, San Diego, CA 92169, certify that the professional translation of this document from Portuguese to English has been performed by myself, a qualified translator fluent in both languages, and that the following is an accurate and complete translation of the document.



Date: March 2, 2026.





FEDERATIVE REPUBLIC OF BRAZIL
CIVIL REGISTRY OF NATURAL PERSONS
MARRIAGE CERTIFICATE

Current name of spouses:

CPF

Antonio de Azevedo Donatti	061.603.489-06
Ana Luiza Tonolli Polli Donatti	071.516.879-74

Registration

105197 01 55 2026 2 00109 059 0015801 12

1st Spouse

Date of Birth

Antonio de Azevedo Donatti	12	27	1992
----------------------------	----	----	------

Nationality	Marital Status	City of Birth	State
Brazilian	Single	Florianópolis	Santa Catarina

Parents

Neuri Vilson Donatti; Maria Cristina Borba de Azevedo Donatti

Name assumed after marriage

Antonio de Azevedo Donatti

2nd Spouse

Date of Birth

Ana Luiza Tonolli Torres Polli	02	14	1989
--------------------------------	----	----	------

Nationality	Marital Status	City of Birth	State
Brazilian	Single	Florianópolis	Santa Catarina

Parents

Lincoln Torres Polli; Lucyane Tonolli Polli

Name assumed after marriage

Ana Luiza Tonolli Polli Donatti

Date of the marriage ceremony or, in the case of a stable union conversion, date of registration	Month	Date	Year
January twenty-sixth, two thousand twenty-six	01	26	2026

Marital Property Regime

Partial Community of Property

Date of the marriage registration	Month	Date	Year
January twenty-sixth, two thousand twenty-six	01	26	2026

NOTES

No record

Fees: Marriage license of the same registry - Protocol: 06977 - R\$358.44; FRJ: R\$81.47; ISS - R\$32.17; Paid seal - R\$0.00; Communication to another office of the performed act - R\$8.26, FRJ: R\$1.88; Notes - R\$21.90, FRJ: R\$4.98; Publication fee of ARPEN notice - R\$20.05; Marriage registration - R\$206.79, FRJ: R\$47.00; Transfer of annotation - Santa Catarina - R\$27.97; Total Fees: R\$643.41 - Total Funds: R\$135.33 - Total: R\$810.91. Inspection seal No. HSD72660-LLGQ. 1st Copy of the Certificate.

CNS: 105197
CIVIL REGISTRY OFFICE OF TITLES AND DOCUMENTS
Florianópolis - Santa Catarina

Iolê Luz Faria
Chief Registrar

Rua Emilio Blum, 131, Block A, Room 801 - Centro - Phone: (48)
3225-2470

The content of this certificate is true. I certify.
Florianópolis - Santa Catarina, January 26, 2026.

---//signature//---

Marcelo dos Santos da Silva
Clerk



Judiciary
State of Santa Catarina
Electronic Inspection Seal
Regular seal

HSD72660-LLGQ

Check the act details at:
www.tjsc.jus.br/selo

IA018182980

I, Carolina Favero da Silva, telephone number 415 425-2508, mailing address P.O. Box 90487, San Diego, CA 92169, certify that the professional translation of this document from Portuguese to English has been performed by myself, a qualified translator fluent in both languages, and that the following is an accurate and complete translation of the document.



Date: March 2, 2026.



REPÚBLICA FEDERATIVA DO BRASIL
REGISTRO CIVIL DAS PESSOAS NATURAIS
CERTIDÃO DE CASAMENTO

Nome atual dos cônjuges:

Antonio de Azevedo Donatti

Número do CPF

061.603.489-06

Ana Luiza Tonolli Polli Donatti

071.516.879-74

Matricula

105197 01 55 2026 2 00109 059 0015801 12

1º Cônjuge

Antonio de Azevedo Donatti

data de nascimento

27

12

1992

Nacionalidade

brasileiro

Estado Civil

solteiro

Município da naturalidade

Florianópolis

UF

SC

Genitor(es)

Neuri Vilson Donatti; Maria Cristina Borba de Azevedo Donatti

Nome que passou a utilizar

Antonio de Azevedo Donatti

2º Cônjuge

Ana Luiza Tonolli Torres Polli

data de nascimento

14

02

1989

Nacionalidade

Brasileira

Estado Civil

solteira

Município da naturalidade

Florianópolis

UF

SC

Genitor(es)

Lincoln Torres Polli; Lucyane Tonolli Polli

Nome que passou a utilizar

Ana Luiza Tonolli Polli Donatti

Data da celebração do casamento ou, se for o caso de conversão de união estável, data do registro

Vinte e seis de janeiro de dois mil e vinte e seis

26

01

2026

Regime de Bens

Comunhão Parcial de Bens

Data de registro do casamento

Vinte e seis de janeiro de dois mil e vinte e seis

26

01

2026

OBSERVAÇÕES

Não há

Emolumentos: Hab. de cas. do próprio cart.- Protocolo: 06977 - R\$358,44 FRJ: R\$81,47; ISS - R\$32,17; Selo pago - R\$0,00; Comunicação a outra serventia de ato praticado - R\$8,26 FRJ: R\$1,88; Anotações - R\$21,90 FRJ: R\$4,98; Taxa de publicação do edital ARPEN - R\$20,05; Registro de casamento - R\$206,79 FRJ: R\$47,00; Repasse de anotação - SC - R\$27,97; Total Emolumentos: R\$643,41 - Total Fundos: R\$135,33 - Total: R\$810,91. Selo de Fiscalização nº HSD72660-LLGQ, 1ª Via da Certidão.

CNS nº 105197
OFICIO DE REG CIVIL TIT E DOCTOS
Florianópolis - SC

Iolê Luz Faria
Oficial Titular

Rua Emilio Blum, 131, Bloco A, Sala 801 - Centro - Fone: (48)
3225-2470

O conteúdo da certidão é verdadeiro. Dou Fé.
Florianópolis - SC, 26 de janeiro de 2026

Marcelo dos Santos da Silva
Escrevente



Poder Judiciário
Estado de Santa Catarina
Selo Digital de Fiscalização
Selo normal
HSD72660-LLGQ
Confira os dados do ato em:
www.tjsc.jus.br/selo

IA018182980



FEDERATIVE REPUBLIC OF BRAZIL
CIVIL REGISTRY OF NATURAL PERSONS

BIRTH CERTIFICATE
NAME:
Ana Luiza Tonolli Torres Polli

CPF:

071.516.879-74

REGISTRATION:

105197 01 55 1989 1 00136 033 0052300 65

DATE OF BIRTH IN FULL

DAY

MONTH

YEAR

February fourteenth, nineteen eighty-nine

14

02

1989

TIME OF BIRTH

CITY OF BIRTH

8:15 AM

Florianópolis/Santa Catarina

CITY OF REGISTRATION AND STATE

PLACE, CITY OF BIRTH AND STATE

SEX

Florianópolis/Santa Catarina

Dr. Carlos Corrêa Maternity, Florianópolis/Santa Catarina

Female

FILIATION

Lincoln Torres Polli and Lucyane Tonolli Polli

GRANDPARENTS

Paternal grandparents: João Polli and Dalva Torres Polli

Maternal grandparents: José Antonio Tonolli and Caly Irene Santana Tonolli

TWIN

NAME AND REGISTRATION NUMBER OF THE TWIN(S)

No

DATE OF REGISTRATION IN FULL

LIVE BIRTH REGISTRATION NUMBER

February fourteenth, nineteen eighty-nine

NOTES

Witnesses: Julio Cesar Seara and Vicente de Paulo Silva. CPF annotation seal: HCB07950-X186

Fees: Certificate R\$ 36.49; Funds R\$ 8.29; ISS R\$ 1.82; Stamp R\$ 0.00; Total R\$ 46.60.

OFFICE NAME: **CIVIL REGISTRY OFFICE OF TITLES AND DOCUMENTS**

REGISTRAR: **Iolê Luz Faria**

CITY/JUDICIAL DISTRICT/STATE: **Florianópolis/Santa Catarina**

ADDRESS: Rua Emilio Blum, 131, Block A, Room 801 - Centro -

Phone: (48) 3225-2470

PRINTED BY: SANDRO

The content of this certificate is true. I certify.
Florianópolis, September 2, 2024

---//signature//---

Luiz Eduardo Vieira
Deputy Registrar



Judiciary
State of Santa Catarina
Electronic Inspection Seal
Regular seal

HFB10635-CVE2

Check the act details at:
www.tjsc.jus.br/selo

I, Carolina Favero da Silva, telephone number 415 425-2508, mailing address P.O. Box 90487, San Diego, CA 92169, certify that the professional translation of this document from Portuguese to English has been performed by myself, a qualified translator fluent in both languages, and that the following is an accurate and complete translation of the document.



Date: March 2, 2026.



REPÚBLICA FEDERATIVA DO BRASIL
REGISTRO CIVIL DAS PESSOAS NATURAIS

CERTIDÃO DE NASCIMENTO

NOME:

Ana Luiza Tonolli Torres Polli

CPF

071.516.879-74

MATRÍCULA:

105197 01 55 1989 1 00136 033 0052300 65

DATA DE NASCIMENTO POR EXTENSO

Quatorze de fevereiro de mil novecentos e oitenta e nove

DIA
14

MÊS
02

ANO
1989

HORA

08:15

NATURALIDADE

Florianópolis/SC

MUNICÍPIO DE REGISTRO E UNIDADE DA FEDERAÇÃO

Florianópolis/SC

LOCAL, MUNICÍPIO DE NASCIMENTO E UF

**Maternidade Dr. Carlos Corrêa,
Florianópolis/SC**

SEXO

Feminino

FILIAÇÃO

Lincoln Torres Polli e Lucyane Tonolli Polli

AVÓS

Avós paternos: João Polli e Dalva Torres Polli

Avós maternos: José Antonio Tonolli e Caly Irene Santana Tonolli

GÊMEO

Não

NOME E MATRÍCULA DO(S) GÊMEO(S)

DATA DO REGISTRO POR EXTENSO

Quatorze de fevereiro de mil novecentos e oitenta e nove

DECLARAÇÃO DE NASCIDO VIVO

OBSERVAÇÕES

Testemunhas: Julio Cesar Seara e Vicente de Paulo Silva. Selo de averbação de CPF: HCB07950-XI86

Emolumentos: Certidão R\$ 36,49; Fundos R\$ 8,29; ISS R\$ 1,82; Selo R\$ 0,00; Total R\$ 46,60.

NOME DO OFÍCIO: **OFÍCIO DE REG CIVIL TIT E DOCTOS**

OFICIAL REGISTRADOR: **Iolê Luz Faria**

MUNICÍPIO/COMARCA/UF: **Florianópolis/SC**

ENDEREÇO: **Rua Emilio Blum, 131, Bloco A, Sala 801 - Centro -**

Fone: **(48) 3225-2470**

IMPRESSO POR: **SANDRO**

O conteúdo da certidão é verdadeiro. Dou Fé.
Florianópolis, 02 de setembro de 2024

Luiz Eduardo Vieira
Oficial Substituto



Poder Judiciário
Estado de Santa Catarina
Selo Digital de Fiscalização
Selo normal

HFB10635-CVE2

Confira os dados do ato em:
www.tjsc.jus.br/selo

ARPENBRASIL
ASSOCIAÇÃO NACIONAL DOS REGISTRADORES DE PESSOAS NATURAIS
BA 027830751 BRP



GL693013



Assinatura do titular / Signature du titulaire /
Bearer's signature / Firma del titular

Este passaporte deve ser assinado pelo titular, salvo em caso de incapacidade.

Ce passeport doit être signé
par le titulaire, sauf en cas d'incapacité.

This passport must be signed,
except where the bearer is unable to do so.

Este pasaporte debe ser firmado por el titular, salvo en caso de incapacidad.



REPÚBLICA
FEDERATIVA
DO BRASIL

UNITED STATES OF AMERICA

VISA



Issuing Post Name

PORTO ALEGRE

Surname

TONOLLI TORRES POLLI

Given Name

ANA LUIZA

Passport Number

FR376931

Entries

M

Annotation

Issue Date

07NOV2023

Sex

F

Control Number

20233070370036

Visa Type /Class

R B1/B2

Birth Date

14FEB1989

Nationality

BRZL

Expiration Date

02NOV2033

0101

T4626948

VNUSATONOLLI<TORRES<POLLI<<ANA<LUIZA<<<<<<<<

FR376931<9BRA8902144F3311020B3PTA07UI8912290