

APPENDIX H

Provisional Patent Application Abstracts

United States Patent and Trademark Office — DCXchange.net, A TooziT Platform

DCXchange.net — A TooziT LLC Platform
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This appendix constitutes the full abstract reference for all fourteen DCXchange.net provisional patent applications. Each entry provides the Description of Invention and Scope of Coverage for the relevant component technology. Patent No. 1 of 14, covering the complete integrated exchange architecture, has been filed and assigned a USPTO application number. Patents No. 2 through 14 cover individual component technologies and are pending filing within the twelve-month priority window established by Patent No. 1.

This appendix is intended for IP counsel, technology acquirers, licensing candidates, and due diligence reviewers who require the full technical scope of each application. For a high-level registry of all 14 applications without full abstract text, refer to Appendix D of the main pro forma document.

COMPLETE PATENT REGISTRY

No.	Patent Title	Status	Application No.
1	Provisional Patent on the Complete DCXchange.net Exchange Architecture	FILED ★	[Assigned]
2	Configurable Instrument Schema Engine	Pending Filing	Pending
3	Multi-Platform Synchronization Framework	Pending Filing	Pending
4	Tiered Access Control Framework for Multi-Vertical Financial Instrument Marketplaces	Pending Filing	Pending
5	Buyer-Initiated Contact Protocol with Bilateral Identity Protection	Pending Filing	Pending
6	Immutable Audit-Linked Internal Messaging System for Financial Instrument Marketplaces	Pending Filing	Pending
7	Instrument Performance Status Lifecycle Management System	Pending Filing	Pending
8	Zip-Code-Based Contextual Service Provider Discovery Engine	Pending Filing	Pending
9	Portfolio and Tape Aggregation Display System for Private Instrument Marketplaces	Pending Filing	Pending
10	Dual-Role Participant Classification System	Pending Filing	Pending
11	Anonymous Buyer Preference Filtering System	Pending Filing	Pending

12	Multi-Vertical Instrument Taxonomy with Dynamic Field Schema Inheritance	Pending Filing	Pending
13	Saved Search Alert Priority Tiering System	Pending Filing	Pending
14	Open Ascending-Bid Auction Engine with Access Fee Gating, Date Lock Enforcement, and Real-Time Bid Transparency	Pending Filing	Pending

FULL PATENT APPLICATION ABSTRACTS

The following abstracts constitute the Description of Invention and Scope of Coverage for each of the fourteen DCXchange.net provisional patent applications. Patents No. 2 through 14 are pending filing within the twelve-month priority window established by the filed Patent No. 1. All technologies described herein are the exclusive intellectual property of TooziT LLC.

★ PATENT NO. 1 OF 14 — FILED ★

Provisional Patent on the Complete DCXchange.net Exchange Architecture

Description of Invention

This provisional patent application describes and claims priority on the complete integrated technology architecture of the DCXchange.net platform a universal, instrumentagnostic, twosided private financial instrument exchange operating across web and native mobile platforms on a unified data layer. The complete architecture encompasses the instrument schema configuration engine, the multiplatform API synchronization framework, the tiered participant access and permission control system, the buyerinitiated contact protocol with identity protection, the immutable internal messaging and audit system, the instrument lifecycle management system, the geographic service provider discovery engine, the portfolio and tape aggregation display system, the dualrole participant classification system, the anonymous buyer preference filtering mechanism, the multivertical instrument taxonomy with dynamic field schema inheritance, and the saved search alert priority tiering system all operating as an integrated whole to constitute the DCXchange.net exchange platform. **

Scope of Coverage

This umbrella provisional establishes the earliest possible priority date covering the complete DCXchange.net system architecture as an integrated invention. It provides protective coverage for all component technologies described within this application as a unified system, including any combination of the described elements, and serves as the foundational priority date reference for all subsequent individual provisional and nonprovisional patent applications filed by TooziT covering component technologies of the DCXchange.net platform. All fourteen component technologies identified in this appendix fall within the scope of this umbrella application. **Component Technology Applications Pending Filing** *The following twelve provisional patent applications cover the individual component technologies of the DCXchange.net platform. Each application will be filed with the USPTO within the twelvemonth priority window established by Patent No. 1. Filing order will be determined by priority of development and commercial sensitivity of each component technology. All applications will be filed under the TooziT entity as the assignee.* **PATENT NO. 2 OF 14 PENDING FILING** **Configurable Instrument Schema Engine**

PATENT NO. 2 OF 14 — PENDING FILING

Configurable Instrument Schema Engine

Description of Invention

A software system and method for enabling a financial instrument marketplace platform to support an unlimited number of instrument types and verticals through the dynamic configuration of instrument field schemas stored as database records, without requiring application code changes, database schema migrations, or platform redeployment when new instrument types are added. The engine stores instrument-type definitions as structured configuration metadata specifying field types, validation rules, display groupings, required versus optional status, and search index eligibility for each field. All platform components --- the API layer, the web interface, the mobile application, and the data storage layer --- respond dynamically to schema configuration changes in real time. **

Scope of Coverage

Covers all methods and systems for dynamic, configuration-driven instrument type definition and display in a multi-vertical financial instrument marketplace, including any implementation in which instrument field schemas are stored as data rather than code and serve as the authoritative definition of instrument listing requirements across all platform components.

PATENT NO. 3 OF 14 — PENDING FILING **Multi-Platform Synchronization Framework**

Description of Invention

A software architecture and method for maintaining complete, real-time data consistency and feature parity across a web browser application, an iOS native mobile application, and an Android native mobile application through a single shared API layer, such that any data creation, modification, or status change event initiated on any platform is immediately reflected on all other platforms without platform-specific data stores, synchronization delays, or feature discrepancies between access points. **

Scope of Coverage

Covers all architectures and methods for unified API-driven synchronization across web and multiple native mobile platforms in a financial instrument marketplace context, including any implementation in which a single data layer and API surface serves as the exclusive data source for all client applications simultaneously.

PATENT NO. 4 OF 14 — PENDING FILING **Tiered Access Control Framework for Multi-Vertical Financial Instrument Marketplaces**

Description of Invention

A software system and method for governing differentiated access to listing data, due diligence materials, contact initiation capabilities, search and filtering tools, analytics, and transaction workflow functions across a multi-tier participant classification system in a financial instrument marketplace, enforced at the API layer prior to any database query execution, such that access entitlements are determined by the authenticated participant's role classification and subscription tier without reliance on client-side permission management. **

Scope of Coverage

Covers all systems and methods for API-layer-enforced, role-and-tier-based access control in a financial instrument marketplace with multiple participant types and multiple subscription levels, including any implementation in which permission evaluation precedes database interaction and cannot be circumvented through client-side manipulation.

PATENT NO. 5 OF 14 — PENDING FILING **Buyer-Initiated Contact Protocol with Bilateral Identity Protection**

Description of Invention

A software system and method for enabling communication between buyers and sellers in a financial instrument marketplace in which all contact initiation capability is exclusively available to the buyer role, seller identity and contact information are never disclosed on any listing or through any platform interface regardless of buyer tier, buyer identity and contact information are never disclosed to the seller prior to mutual voluntary disclosure within a protected messaging thread, and no mechanism exists within the platform for seller-initiated unsolicited contact with any buyer account. **

Scope of Coverage

Covers all systems and methods for structurally enforced buyer-only contact initiation with bilateral identity protection in a financial instrument or asset marketplace, including any implementation in which platform architecture rather than terms of service alone prevents seller-initiated buyer contact and protects counterparty identity until voluntary mutual disclosure.

PATENT NO. 6 OF 14 — PENDING FILING

Immutable Audit-Linked Internal Messaging System for Financial Instrument Marketplaces

Description of Invention

A software system and method for facilitating communications between marketplace participants through a platform-integrated messaging infrastructure in which every communication thread is permanently associated with a specific listed instrument, every message is stored in tamper-evident, unalterable form after transmission, neither party to a thread may delete or edit any transmitted message, a complete thread history constitutes a legally defensible record of all representations made during instrument negotiations, and the entire message record is available to platform administrators for dispute resolution and regulatory compliance purposes. **

Scope of Coverage

Covers all systems and methods for instrument-linked, immutable, audit-trail-integrated internal messaging in a financial instrument marketplace, including any implementation in which message permanence and tamper-evidence are enforced at the data storage layer and thread association with a specific listed instrument is maintained throughout the lifecycle of the listing.

PATENT NO. 7 OF 14 — PENDING FILING

Instrument Performance Status Lifecycle Management System

Description of Invention

A software system and method for managing the progression of financial instrument listings through a defined set of status states --- including draft, active, under contract, sold, and expired --- with automated status transition triggers, buyer and seller notification events tied to each status change, archive and searchability functions for completed transactions, and seller prompts for renewal or relisting upon expiration, such that the status history of every instrument listing constitutes a complete, timestamped audit record of the listing's marketplace lifecycle. **

Scope of Coverage

Covers all systems and methods for defined-state lifecycle management of financial instrument listings in a marketplace platform, including any implementation in which automated triggers, notifications, and archive functions are associated with status transitions and the complete status history is preserved as a platform record.

PATENT NO. 8 OF 14 — PENDING FILING

Zip-Code-Based Contextual Service Provider Discovery Engine

Description of Invention

A software system and method for dynamically generating geographically relevant service provider recommendations to a marketplace participant viewing a financial instrument listing tied to a specific property location, in which service providers including but not limited to title companies, insurance agencies, property inspectors, attorneys, and contractors are indexed by zip code and instrument type, and relevant providers are surfaced to the viewing participant based on the geographic location of the collateral property associated with the listed instrument. **

Scope of Coverage

Covers all systems and methods for geographic and instrument-type-indexed service provider discovery integrated into a financial instrument listing platform, including any implementation in which collateral property location data drives dynamic contextual service provider recommendations to marketplace participants at the point of listing review.

PATENT NO. 9 OF 14 — PENDING FILING

Portfolio and Tape Aggregation Display System for Private Instrument Marketplaces

Description of Invention

A software system and method for enabling sellers in a financial instrument marketplace to group multiple individual instrument listings into a single aggregated portfolio or tape package offering, with automated calculation and display of aggregate metrics including but not limited to total unpaid principal balance, weighted average coupon, weighted average maturity, loan count, geographic distribution, property type composition, and performance status breakdown, presented as a unified listing accessible to buyers as a single portfolio acquisition opportunity. **

Scope of Coverage

Covers all systems and methods for automated aggregation and metric calculation in multi-instrument portfolio listings within a private financial instrument marketplace, including any implementation in which individual instrument data is aggregated into standardized portfolio metrics displayed as a unified buyer-facing listing.

PATENT NO. 10 OF 14 — PENDING FILING

Dual-Role Participant Classification System

Description of Invention

A software system and method for identifying, classifying, and managing marketplace participants who simultaneously hold active accounts in both the seller role and the buyer role within the same platform, routing access permissions, interface experiences, notification streams, and analytics dashboards appropriately based on the active role context of each platform session, and preventing role-based access controls applicable to one role from being circumvented through the participant's simultaneous access to the other role. **

Scope of Coverage

Covers all systems and methods for simultaneous multi-role participant management in a financial instrument marketplace, including any implementation in which a single user account may hold seller and buyer roles concurrently with role-appropriate permission enforcement, interface routing, and notification management for each role context.

PATENT NO. 11 OF 14 — PENDING FILING

Anonymous Buyer Preference Filtering System

Description of Invention

A software system and method enabling sellers in a financial instrument marketplace to define counterparty preferences specifying the classification of buyers eligible to initiate contact with their listings --- including classifications such as individual investors, small funds, institutional buyers, or all verified buyers --- without disclosing the composition, size, or identity of the buyer pool to the seller at any time, and enforcing those preferences by filtering contact initiation eligibility at the platform level based on the contacting buyer's verified classification. **

Scope of Coverage

Covers all systems and methods for seller-defined, anonymity-preserving counterparty preference filtering in a financial instrument marketplace, including any implementation in which buyer pool composition and identity remain undisclosed to sellers while seller-defined contact eligibility preferences are enforced at the platform access control layer.

PATENT NO. 12 OF 14 — PENDING FILING

Multi-Vertical Instrument Taxonomy with Dynamic Field Schema Inheritance

Description of Invention

A software system and method for organizing financial instrument types within a hierarchical taxonomy in which instrument categories inherit common marketplace attribute fields from a parent schema while extending with instrument-specific fields defined in child schema configurations, enabling a single listing creation interface to serve all instrument types through conditional field display logic driven by the instrument type selection, without requiring separate listing forms, separate database tables, or separate application code for each instrument category. **

Scope of Coverage

Covers all systems and methods for hierarchical instrument taxonomy management with schema inheritance and conditional field display in a multi-vertical financial instrument marketplace, including any implementation in which parent schema fields are inherited by child instrument type schemas and conditional field display is driven by instrument type selection at the user interface layer.

PATENT NO. 13 OF 14 — PENDING FILING

Saved Search Alert Priority Tiering System

Description of Invention

A software system and method for delivering new listing alerts to marketplace participants who have established saved search criteria, in which alert delivery is sequenced according to the participant's subscription tier such that participants at higher subscription tiers receive notification of new matching listings within a shorter time window following listing publication than participants at lower subscription tiers, creating a defined and consistently enforced competitive advantage in listing discovery for higher-tier subscribers as a function of their subscription level. **

Scope of Coverage

Covers all systems and methods for tier-differentiated, time-sequenced new listing alert delivery in a financial instrument marketplace, including any implementation in which the elapsed time between new listing publication and subscriber notification is a defined function of the notified subscriber's subscription tier classification.

PATENT NO. 14 OF 14 — PENDING FILING

Open Ascending-Bid Auction Engine with Access Fee Gating, Date Lock Enforcement, and Real-Time Bid Transparency

Description of Invention

A software system and method for implementing a structured, time-limited, open ascending-bid auction capability within a two-sided private financial instrument marketplace, in which all active bids are visible to all qualified auction participants in real time throughout the auction period; auction participation is gated by a two-condition access control mechanism requiring both platform account verification and payment of a periodic auction access fee; auction parameters including start date, end date, duration, reserve amount, minimum bid increment, and bidder qualification level are configured by the seller at listing creation and are rendered immutable by the system architecture upon receipt of the first qualifying bid, such that no modification to any auction parameter is architecturally possible after first bid regardless of the requesting user's role or tier; an optional auto-extend mechanism automatically advances the auction end timestamp when a qualifying bid is received within a defined interval prior to the scheduled auction close, with the trigger and updated end time delivered to all registered participants in real time; every auction listing progresses through a defined set of status states --- including Draft, Scheduled, Active, Extended, Reserve Met, Closed-Sold, Closed-Reserve Not Met, Closed-No Bids, and Cancelled --- governed by a state machine with automated transition triggers keyed to calendar time, bid events, and seller actions; and the auction access fee charged to participating buyers is a flat periodic subscription add-on evaluated and enforced at the API layer on every bid submission and bidder registration request, independent of any transaction outcome, hammer price, or auction result. **

Scope of Coverage

Covers all systems and methods for implementing an open ascending-bid auction module within a private financial instrument marketplace platform, including any implementation in which: real-time bid visibility is provided to all qualified participants regardless of bid position; auction access is conditioned on both identity verification and a periodic access fee enforced at the API layer; auction parameter immutability after first bid is enforced architecturally rather than through terms-of-service restriction alone; an auto-extend mechanism adjusts the auction closing timestamp in response to qualifying late bids; a defined lifecycle state machine governs auction status progression with automated triggers and participant notification; and the auction access fee revenue stream is structured as a flat periodic access fee independent of any transaction completion, closing rate, or hammer price outcome. Covers all implementations of the described system regardless of the instrument category, asset class, or marketplace vertical to which the auction capability is applied.

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