

Logo:**Name:**

Kleya – Welcome to Portugal

What:

A tailor-made proposal that will fit your needs

A solution tailored to your specific needs, with direct and single point of contact. Kleya's approach is to assure you that we will take care of all the details for you, so that can make the most out of your life in Portugal.

If you are an investor, count on our professionals and their local know-how to find the best investment opportunities in Portugal and at the same time, maximize your returns.

Main Features:

You can choose from vast range of services and build your own plan.

From finding the perfect place to live, to helping throughout the whole moving process, selling and/or purchasing the property to business consulting and even aid with residency & citizenship issues- Kleya has all the solutions.

Property

Moving to another country or having a second residence can be quite challenging. Kleya finds customized solutions by bearing in mind all the critical factors.

Qualified professionals save you time in finding a new home, while allowing you to take the best value for money options.

PROPERTY BROKERAGE

Within Kleya's automated private area, you will have access to properties that are for sale and that ideally match your profile based on previously provided details. This also means that you will have the ability to make direct contact with qualified agents that will communicate with you in your chosen language. This streamlined service together with on-going customer support means that you will not waste time searching and identifying the best locations and properties. Kleya will also act as an advisor, giving clients all the required information so that you can make an informed decision. Kleya, not only offers the most ideal matches for client, but also provides them with comparative examples of properties that are for sale in the market, locations and evaluations, making sure that the client has the best possible range of choices currently on offer.

PROPERTY FINDING – ACQUISITION

Kleya will aid and assist you in finding the perfect real estate option that best suits your prerequisites. This will include:

- Development of a wish list of options resulting from an in-depth understanding of the clients' profile and background information. This means saving time searching through websites and contacting various real estate agencies who do not take into consideration our profile. Kleya finds the optimal opportunities based on your particular requirements.
- Initial assessment, whereby our consultants conduct a primarily on-site visit in order to gain an overview on the location and construction and thus avoiding any unforeseen issues prior to your first on-site visit.
- Visit planning and schedule management; Kleya endeavours to maximise your time effectively and efficiently by planning site visits in accordance to your agenda.
- Compilation of a shortlist; Kleya will assist you in all aspects of the decision-making process through a rating and scoring system pertaining to your selected options.
- During the negotiation and final deal closure, it is vital to be firm and providing excellent communication and negotiation skills. Kleya is experienced and can help you with the final hurdle, even agreeing on the ultimate deal on your behalf.

PROPERTY FINDING - RENTAL

Kleya will help find the best rental property that best fits your needs. This includes:

- Development of an option wish list resulting from an in-depth understanding of the client's profile and background information. This means that you save time searching websites and contacting various real estate agencies who may not take into consideration our profile. This delivers a much more accurate picture. Kleya finds the optimal rental opportunities based on your particular requirements.
- Initial assessment, whereby our consultants conduct a primarily on-site visit in order to gain an overview on the location and building and thus avoiding any unforeseen details prior to your first on-site visit.
- Visit planning and schedule management, Kleya endeavours to maximise your time effectively and efficiently by planning site visits in accordance to your agenda.

- Shortlist creation; Kleya provides assistance in all aspects of the decision-making process.
- During the negotiation and final deal closure, it is vital to be firm and providing excellent communication and negotiation skills. Kleya is experienced and can help you with the final hurdle, even agreeing on the ultimate deal on your behalf.

HOUSE MANAGEMENT

Management of all main household services would include:

- Sourcing of suitable suppliers, helping the client to save time and money, matching the best fit in accordance with the clients' demands.
- Definition of service levels required, allowing for the on-going service delivery again in accordance with the clients' needs.
- On going assessment of service levels, fulfilling the agreed high level of service and if a certain supplier is not up to the required standards Kleya will provide a replacement.

Disclaimer: Emoluments, dues and registration fees incurred on behalf of clients will be charged at cost upon presentation of the corresponding receipts. Travel expense fees over a 100 km radius from Lisbon may apply.

Relocation

Kleya's Relocation Service ensures that your moving and settling in process goes like clockwork. From leaving home to your first moments in Portugal. A new beginning.

BASIC FORMALITIES PROCEDURES

Handling of all essential paperwork and legal procedures that need to be dealt with if planning to live in Portugal. This includes the following services:

- Driving permit; a special form needs to be submitted to the Institute for Mobility and Transport (IMT, Instituto da Mobilidade e dos Transportes) within a 60-day period after obtaining your residence certificate.
- Registration with your local health service and if necessary procurement of vaccine certificates. Although you may already have comprehensive health insurance that offers access to a private health facility, we strongly recommend registering with the local health service, as that would guarantee access to the National Health System, vital in the case of emergency.
- Hobby Permit, whatever your favourite pastime is, we will make sure that you have all the required permits necessary to continue enjoying these activities.
- Providing you with support upon your arrival and ensuring that all the essential documentation is collated on time.
- On-going support throughout these procedures acting as translators and interpreters.

CONCIERGE SERVICES

Support by our team of experienced locals and reliance on Kleya's expertise and insider know-how to guide and offer assistance in all manner of requirements. From basic and practical advice, for instance directions in your new city, local services, recommended restaurants and cafés etc. To being personally available and on hand when such occasions are required, for instance getting to know the country and helping you discover how to practise your favourite hobbies (playing golf, surfing, horseback riding, sailing etc).

DISCOVERY TRIP

This is not a traditional tourist package holiday, this is a tailored trip intended to give you the opportunity to fully appreciate Portugal and all the wonderful benefits that the country has to offer. It provides you with all the vital information you require when it comes to living or investing in the country. This involves a short stay, where you can explore your preferred locations and on-site visits to properties that were previously selected for you with Kleya's help. This reconnaissance trip includes all aspects of logistical support during your stay such as accommodation, transportation, concierge services, restaurant bookings and recommendations.

HOUSE UTILITIES

Kleya handles all the documentation and assures that the contract contains all the information that was agreed upon.

Kleya handles all the contractual documentation and assures that the contract contains all the information that was agreed upon.

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MOVING MANAGEMENT

Kleya's support during your relocation process includes:

- Forward planning - Kleya's fine eye for detail will ensure that nothing is left behind or left to chance.
- Sourcing of service providers from our wide range of trusted partners - We can identify and select the best solutions for you.
- Continuous management - Kleya will organise on-site visits with selected partners to ensure that everything is going to plan. We will make sure that your belongings are delivered correctly and on time.

NATIONAL HEALTH SERVICE REGISTRATION

Registration in the local health units and, if necessary, vaccine certification.

(Despite the fact that you may already have health insurance and/or are planning to only attend private hospitals, we strongly recommend to register in the local health units as it is necessary to guarantee access to the National Health System, particularly in emergencies).

PORTUGUESE BANK ACCOUNT

Kleya will provide assistance in opening of an account at your chosen bank or a bank recommended by Kleya.

LIFE MADE EASIER

We will verify correspondence twice monthly (weekly in the first three months), coordinate cleaning and laundry services, manage groceries shopping on your demand, keep the apartment keys to respond to any emergency, lease with the condominium and coordinate any small works that may be necessary. We will also check any mails and correspondence in Portuguese and advise you if any action is required

DRIVING PERMIT

Assistance in obtaining a Driving License in Portugal includes:

- collection and review of all documentation required by the Institute for Mobility and Transport (IMT, Instituto da Mobilidade e dos Transportes)
- Schedule of all medical exams required by IMT
- on site assistance during the collection process of the biometric data at IMT.

Residency Planning

Kleya offers you an integrated solution for your residence counting with the expert advise of our Tax and Legal Partners.

Kleya wants to inspire you to a better life in Portugal, allowing you to focus on what really matters to you. Let Kleya together with its Legal and Tax Partners give you the right advise and take care of all the bureaucratic details and paper work for you with no hassles.

EU CITIZEN REGISTRATION

Kleya will provide support during the registration procedure, ensuring that all necessary documents are submitted in the correct manner, acting as a translator for both parties and making sure that all proceeding are fully understood.

TAX NUMBER REQUEST

The procedure and request for a Portuguese tax number (NIF- Número de identificação Fiscal) for a non-EU citizen. This also includes the nomination of a fiscal representative, which is a mandatory requirement for the application and registration of a residency permit.

GOLDEN VISA PROCESS

Working along our trusted legal partners, Kleya will assist you in the negotiation, purchase and application request for the Golden Visa Residence Permit, through delivery of these essential services:

- Advocate on the public deed conclusion of the properties in question (maximum of two properties), this includes analysis of documentation relating to the properties, from the seller and payment of the relevant taxes.
- Drafting of the necessary power of attorney document. In order to obtain the public deed of sale and complete the purchase, resulting and meeting the requirements for the application of the residence permit.
- Providing assistance and collating all necessary documents to open a bank account, underwrite health insurance and to apply for the Golden Visa permit.
- Assistance with the preparation, negotiation and execution of lease agreements or other user agreements relating to the acquired properties under offer (maximum of two agreements).
- Guidance during the collection of biometric data issued by Serviço de Estrangeiros e Fronteiras (Portuguese Immigration office).

NHR

As our client you will be able to meet with a tax consultant and together we will help determine your eligibility for the Non-Habitual Resident status.

Our Tax Partners will assess your individual situation and eligibility for NHR status whilst requesting your Portuguese tax number. Our partners will also prepare the NHR status application which includes filling in and delivery of the paperwork to the Portuguese tax authorities.

TAX NUMBER

Together with Kleya's Partners, a Portuguese NIF will be provided in a timely manner.

WORK PERMIT AND TAXATION

Letter of secondment or contract relating to expatriation;

Assistance in obtaining the residence permit of the worker and family (in the case of a residence visa) or assistance in the Registry of citizens with the competent City Council;

Registration of the worker (and family) as tax residents, if applicable;

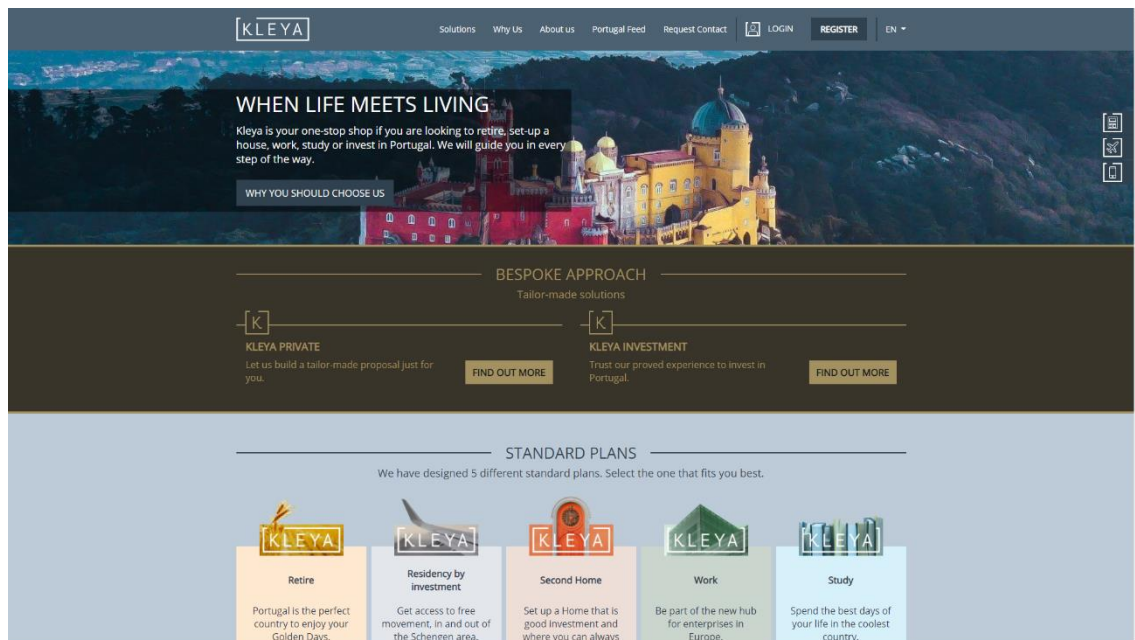
Request for a status of non-habitual residents, as well as the registration of their function as a value-added activity (preparation of application and all necessary documentation), if applicable;

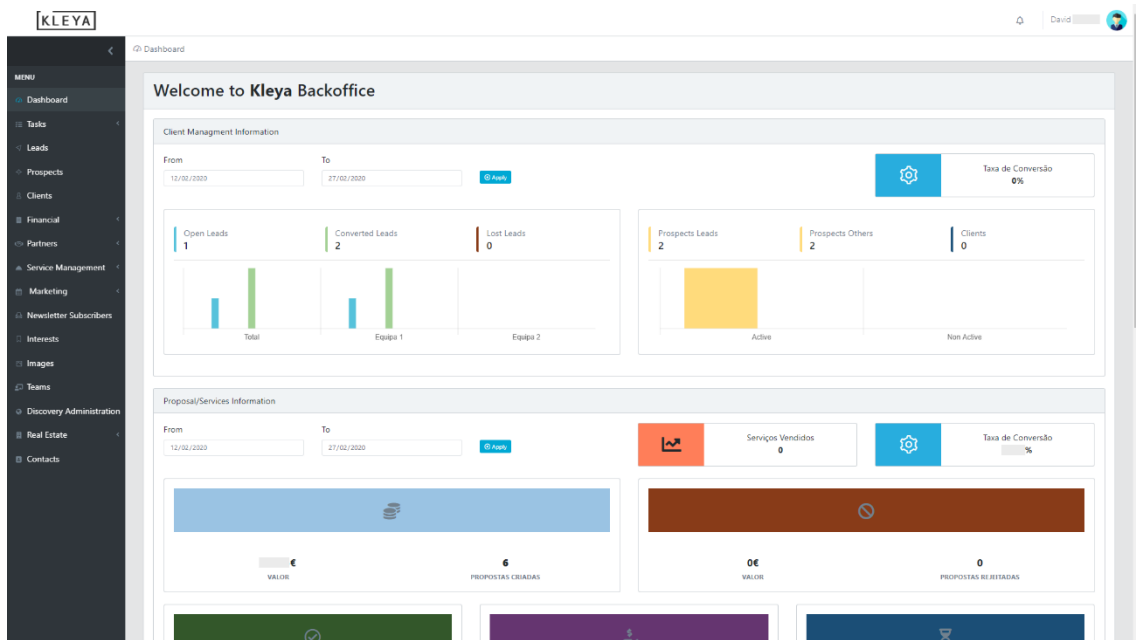
Assistance in the fulfilment of tax duties and withholding obligations of the company.

Consulting

Whether you need to source real estate investment opportunities, help in setting-up your business or manage local and international suppliers and partners, Kleya will assist you in your way to success.

Solution screens:





KLEYA Dashboard / Clients

Search Clients

+ Add Company Prospect + Add Prospect + Add Lead

Search By First Name (First Name)	Search By Last Name (Last Name)	Search By Country of Residence (Country of Residence)
Search By Nationality (Nationality)	Select From Date dd/mm/yyyy	Select To Date dd/mm/yyyy
Search By Email (Email)	Select Source Type None	Select Source Entity None
Search By HQ All		

☐ Clients with pending activities

[@ Users](#) [@ New Plan](#)

KLEYA

David

Dashboard / Client Search / Client Search Results

Dashboard

Tasks

Leads

Prospects

Clients

Financial

Partners

Service Management

Marketing

Newsletter Subscribers

Interests

Images

Teams

Discovery Administration

Real Estate

Contacts

Total Number of Clients:

+ Add Company Prospect

+ Add Prospect

+ Add Lead

Extract Email

Q

Name	Phone	Business Type	Stage	Status	Is Confirmed
Al	00	Consumer	Onboarded	Active	✗
Al	00	Consumer	Onboarded	Active	✓
Bl		Consumer	Onboarded	Active	✓
Bl		Consumer	Onboarded	Active	✗
Cl	00	Consumer	Onboarded	Active	✓
D.		Consumer	Onboarded	Active	✗
di	+1	Consumer	Onboarded	Active	✓
Er	00	Consumer	Onboarding	Active	✗
Er	00	Consumer	Onboarding	Active	✗
Er	00	Consumer	Onboarded	Active	✗

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Page... Go

KLEYA

David

Dashboard / Clients / Edit Client

Edit Client -

Type: Client

Interest: Residency by Investment

Service Package: 1st Phase Proposal - M.

Milestones

Personal Data

Client Segment

Name

Surname

Country

Email

Interest

More Info

Services

Addresses

Contact Info

Team

Household Data

Finance

Tax Data

Invoicing Info

Documents

Discovery Protocol

Discovery Services

Kleya Membership

Maintenance Services

Property Finding

Tasks

Package Name	Value [€]	Proposal Status	Billed	Created	Onboarding	From Company	Actions
Second Home - Old2	11570	Close Rejected	✗	2020 1:45:23 PM	✗	✗	Q
Proposal for M.	16285	Submitted	✗	2020 1:45:23 PM	✗	✗	Q ✓
Final proposal to	16285	Submitted	✗	2020 1:45:23 PM	✗	✗	Q ✓
Proposal for	15175	Submitted	✗	2020 1:45:23 PM	✗	✗	Q ✓
1st Phase Proposal -	4785	Closed-Accepted	✓	2020 1:45:23 PM	✓	✗	Q

KLEYA

David Gomes

Dashboard

Tasks

Leads

Prospects

Clients

Financial

Partners

Service Management

Marketing

Newsletter Subscribers

Interests

Images

Teams

Discovery Administration

Real Estate

Contacts

More Info

Services

Addresses

Contact Info

Team

Household Data

Finance

Tax Data

Invoicing Info

Documents

Discovery Protocol

Discovery Services

Kleya Membership

Maintenance Services

Property Finding

Tasks

Country

Interest

Email

Residency by Investment

Name	Client	Team	Owner	Status	Created	Due Date	SP	Hours Spent
Follow Up Onboarding Op	@live.com	Equipa 2	@kleya.eu	Complete	11/01/2020	22/01/2020		
Follow-up Client Plan Cust	@live.com	Equipa 2	@kleya.eu	In Progress	17/01/2020		GO	
omization - @live.co	m							
Follow-up Client Plan Cust	omization - @live.co	Equipa 2	@kleya.eu	In Progress	17/01/2020		GO	
omization - @live.co	m							
Follow-up Client Plan Cust	omization - @live.co	Equipa 2	marta.montez@kleya.eu	In Progress	17/01/2020		GO	
omization - @live.co	m							
Custom Offer Request	@live.com	Equipa 2	@kleya.eu	Complete	24/01/2020		GO	
- Cliente r								
ecabeu proposta								
Kick-off Task	@live.com	Equipa 2	@kleya.eu	In Progress	16/02/2020			
Follow up - Property Assig	@live.com	Equipa 2	@kleya.eu	In Progress	25/02/2020			
ned								
Follow Up - Discovery Visit	@live.com	Equipa 2	@kleya.eu	In Progress	25/02/2020			
Follow Up - Discovery Visit	@live.com	Equipa 2	@kleya.eu	In Progress	25/02/2020			
Follow Up - Discovery Visit	@live.com	Equipa 2	@kleya.eu	In Progress	25/02/2020			
Follow Up - Discovery Visit	@live.com	Equipa 2	@kleya.eu	In Progress	25/02/2020			

Update Client

Cancel

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Dashboard

Campaign

Edit Campaign

Create Codes

Export Codes

Import Codes

Edit Campaign

Campaign Info

General Info

EN

PT

FR

ES

IT

Campaign Name

Campaign Type

Template Types

Offer Types

Commercial Partner

Campaign Code

Expiration Date

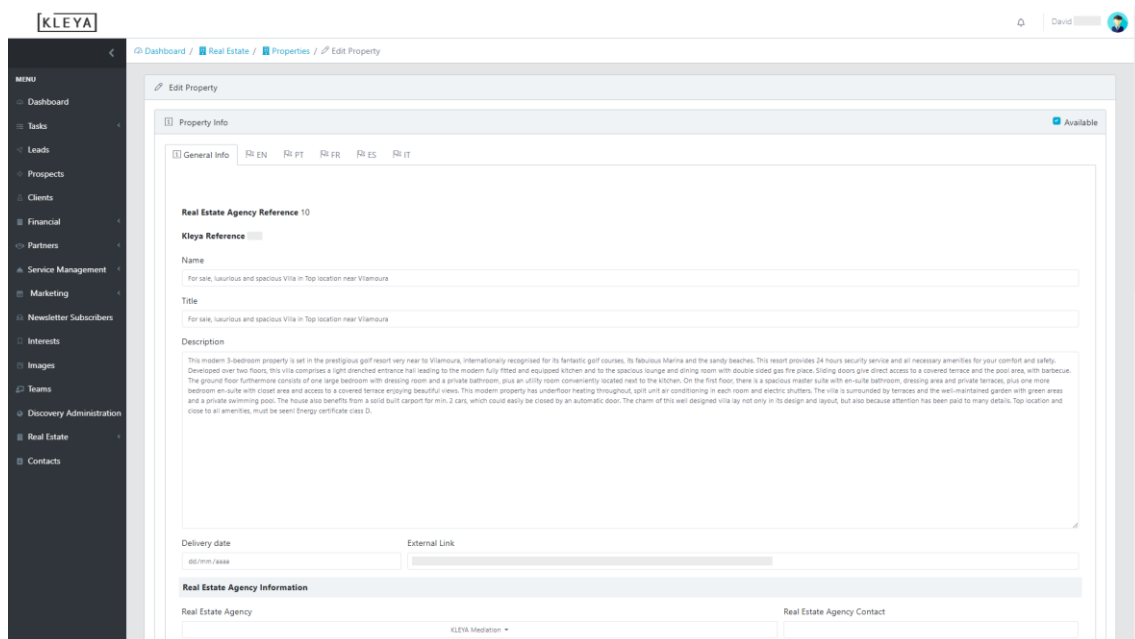
Campaign Logo

Campaign Image

Total Number of Events: 0

Add Event

Name	Date	Category	Actions
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Main technologies:

- Visual Studio
- MS SQL Server
- C# / .net core
- MVC / Entity Framework / Bootstrap
- Git / DevOps
- Azure Services
- UMBRACO CMS