KAUFMAN & COMPANY



KAUFMAN PEOPLE

Team Member Handbook

Who we are, how we work, and what you can expect from us, for every team member across Kaufman & Company and its operating companies.

people.thekaufmanco.com

Version 2.0 · October 2026

A LETTER FROM OUR FOUNDER

Welcome to the team



I'm glad you're here.

We build things meant to last: homes, communities, and the infrastructure behind them. We fund that work ourselves, which gives us a rare kind of freedom. We can make decisions for the long term, move quickly when something is right, and back the people who do the work.

What I ask of everyone here is simple. Tell the truth, even when it's uncomfortable. Do what you said you would do. Take care of the people around you and the partners who trust us. When something goes wrong, raise it early. We can fix almost anything we know about.

We don't count vacation or personal days, because we trust you with your time. Use it. Come back sharp.

This handbook explains how we work and what you can expect from us. Read it, ask questions, and tell us where we can do better.

Daniel Kaufman

Founder & Principal, Kaufman & Company



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Acknowledgment



About this handbook. This handbook applies to employees of Kaufman & Company and the operating companies that adopt it; your offer letter names the entity that employs you. It is a guide, not a contract, and it does not promise employment for any period of time. Where federal, state or local law gives you more than this handbook does, the law applies. Employment is at will unless a signed written agreement says otherwise.

01

OUR STORY

Who we are

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

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

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

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

Three disciplines, one platform

Build
DEVELOPMENT

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

Invest
KAUFMAN VENTURES

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

Operate
LIVING & ADVISORY

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

MISSION & VALUES

What we stand for

Our values are not posters. They are how decisions get made here, and they are what we expect of each other.

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

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

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



What our values look like day to day

Value	In practice
Take care of people and partners	Return calls and emails promptly. Share bad news early and with a plan. Give credit to the people who did the work.
Act with integrity	Write down decisions and commitments. Keep confidential information confidential. If you make a mistake, say so and fix it.
Strive for extraordinary	Own the outcome end to end. Ground decisions in what is actually happening on the site and in the numbers. Keep it simple: short emails, clear owners, fewer handoffs.

02

THE PEOPLE YOU'LL WORK WITH

Leadership

Daniel Kaufman

FOUNDER & PRINCIPAL



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

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

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



Executive team



Daniel Kaufman
Founder & Principal



Rob Davis
President & CIO



Tom Wilson
Chief Financial Officer



David Weston
Chief Technology Officer



Eric Goldberg
Chief Compliance Officer
&
Head of Legal Operations



Jess Dumok
Chief of Staff & Admin Team Lead



Manuel San Ramon
Head of Web & App Development

Kaufman Family Office, Board of Directors

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

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

03

THE PLATFORM

Companies, brands & ventures

You may work across several of these companies. Your offer letter names your employing entity; your manager will tell you which companies your role supports.

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

Eight brands

Haven
ATTAINABLE HOUSING

Foundry
WORKFORCE HOUSING COMMUNITIES

Trellis
RESIDENTIAL COMMUNITIES

Convivium
CO-LIVING & COMMUNITIES

Everwell
LIVING & WELLNESS

District
MIXED USE DESTINATIONS

Weekender
HOTELS & EXPERIENCES

ZeroPoint
AI INFRASTRUCTURE

Kaufman Ventures portfolio

BridgeStar
Partner, client and vendor portal

Meridian
Portfolio intelligence

LandBriefing
National land opportunity watchlist

SpreadSight
Data and analytics

FoundCheck
Diligence tooling

ServerDomes Global
AI data centers and liquid cooling

Mr. Good Container Homes
Modular and container housing

Joint venture partners

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

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

Our work



DEK Builds · Custom mountain homes



DanReDev · Community amenity barn



DK Homes · New construction homes



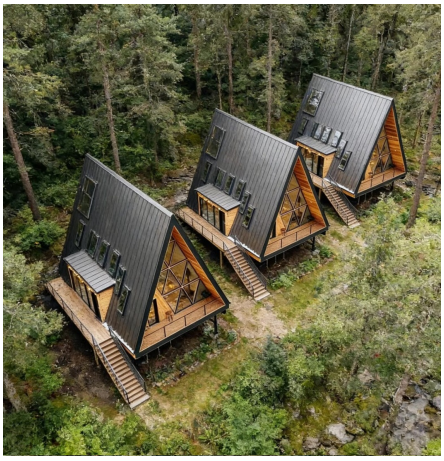
Kaufman Development · Townhome community



Forge Development Partners · Urban townhomes



Convivium Living · Resident clubhouse



DEK Builds · Forest cabins



Factory Row · Jacksonville concept rendering

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

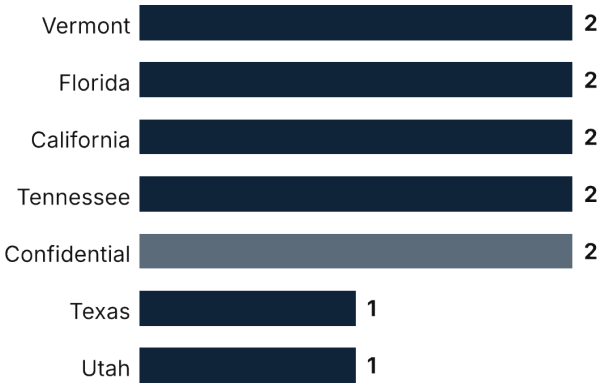
04

WHAT WE'RE BUILDING

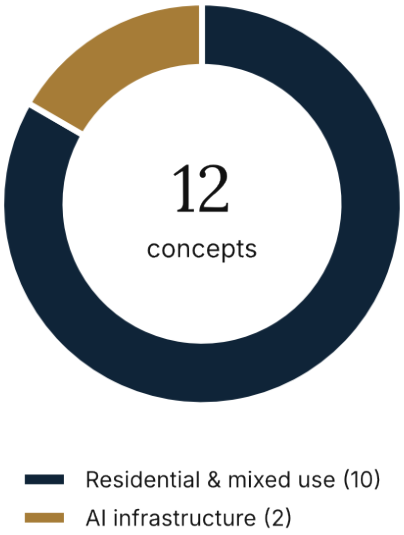
Pipeline & news

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

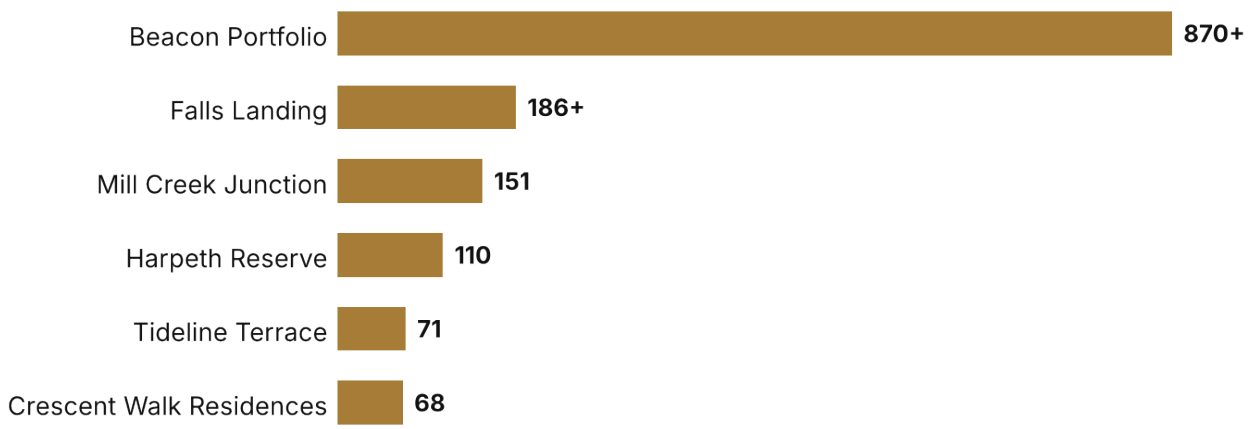
Concepts by market



Concepts by sector



Homes by disclosed concept



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

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

Red Oak Junction	Confidential	Brownfield mixed use redevelopment	Confidential

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

Recent news

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

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

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

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

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

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

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

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

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

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

05

GETTING STARTED

Your first 90 days

1 **Before day one**
Forms, background check, equipment

2 **Week one**
Systems, people, handbook

3 **30 days**
Know the platform

4 **60 days**
Own a piece of work

5 **90 days**
Full speed, written review

Before day one

- Accept your offer and complete new hire forms in Kaufman People (people.thekaufmanco.com).
- Complete the background check disclosure and authorization if your role requires it. Checks are run by our licensed provider, never by us directly.
- Have your Form I-9 documents ready for day one, and complete your W-4 and direct deposit.
- Watch for your welcome email with your start time, location or video link, equipment and manager.

Week one

- Set up company email, multifactor authentication, the password manager and the portals your role uses.
- Meet your manager and the people you will work with most; agree on how you'll check in.
- Read this handbook and sign the acknowledgment.
- Agree on your first 30 day goals.

Checkpoints

When	Focus
30 days	You know the companies, the people, the tools and the priorities for your area. First check in.
60 days	You own a defined piece of work end to end. Second check in on what's working.
90 days	You're running at full speed. A written review sets goals for the next two quarters.

06

REST IS PART OF THE WORK

Time off

VACATION

Unlimited

No set number of days and nothing to accrue. Take the time you need to rest and come back sharp, and actually use it.

PERSONAL DAYS

Unlimited

For appointments, family matters, moving or a day to reset. You don't need to explain the reason.

How to take time off

Time away	Notice	What to do
Personal day or single vacation day	As soon as you know	Tell your manager and set your out of office.
2 to 4 days	At least 1 week	Agree on coverage with your manager before booking.
5 or more consecutive days	At least 2 weeks	Agree on dates and a written coverage plan.
Unplanned, such as illness or an emergency	As soon as you reasonably can	Message your manager; details aren't required.

- Requests are approved unless there is a real business conflict, such as a closing date or lender deadline, or overlapping coverage on a small team. If a conflict comes up, your manager will work with you on other dates.
- While you're away, you're off. Nobody expects you to check email.
- Because vacation and personal days are unlimited and do not accrue, there is no balance to carry over or pay out at separation, except where the law requires otherwise.
- Unlimited time off works on trust. A pattern of absences that leaves work uncovered is handled as a performance matter.

Sick leave

Take the time you need when you or a family member is sick. Sick time is separate from vacation and personal days, and we follow all state and local paid sick leave laws.

Holidays

New Year's Day, Martin Luther King Jr. Day, Memorial Day, Juneteenth, Independence Day, Labor Day, Thanksgiving and the day after, and Christmas Day. The calendar is posted on people.thekaufmanco.com.

Leaves of absence

Family, medical, parental, pregnancy and military leave are provided as required by law. Bereavement, jury duty, witness duty and voting time are provided and paid at least to the extent the law requires. Contact the Admin Team early so we can protect your job, benefits and pay as the law provides.

07

THE FUNDAMENTALS

Employment basics

Equal employment opportunity

We hire, pay, promote and make every employment decision based on qualifications and performance. We do not discriminate on the basis of race, color, religion, creed, sex, pregnancy, sexual orientation, gender identity or expression, national origin, ancestry, age, disability, genetic information, marital status, military or veteran status, or any other status protected by law.

Harassment and respect

Harassment of any kind is not tolerated, whether from a team member, manager, vendor or partner. Report it to your manager, the Admin Team or Legal Operations. We investigate promptly, keep reports as confidential as we can, and do not allow retaliation against anyone who reports in good faith.

Accommodations

We provide reasonable accommodations for disability, pregnancy and religious practice. Ask your manager or the Admin Team.

Classification, hours and location

- Your offer letter states whether you are full or part time, and exempt or non exempt.
- Non exempt team members record and are paid for all hours worked, including overtime. Never work off the clock.
- You may work from an office, a project site or remotely as agreed for your role. Remote team members keep a workspace that protects confidential information.

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TAKING CARE OF YOU

Pay, benefits & expenses

- Pay schedule, benefits eligibility and enrollment details are provided at hire and posted on people.thekaufmanco.com.
- Review every paycheck. If something looks wrong, tell Finance right away and it will be corrected.
- Approved business expenses are reimbursed when submitted with receipts within 30 days. Travel is booked through the Admin Team.

09

PROTECTING TRUST

Conduct & confidentiality

Confidential information
Deal terms, financials, partner and borrower information, property data and personnel records stay confidential, during and after employment. Nothing here limits your right to discuss wages and working conditions or to report possible violations of law to a government agency.

Conflicts of interest
Tell Legal Operations before taking outside work, investing alongside or against a deal we're working on, or doing business with a company where you or family have an interest.

Inside information
Our work can involve material nonpublic information. Never trade on it or pass it on. Ask Legal Operations before any personal investment connected to your work.

Gifts
Don't give or accept gifts or entertainment that could look like they influence a decision. Ordinary business courtesy is fine; when in doubt, ask.

Media and press
Only authorized people speak for the company. Send press inquiries to the Admin Team.

Social media
Don't post confidential information, deal details, site photos or images of people at work without approval. Personal views are your own.

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SECURITY IS EVERYONE'S JOB

Technology & security

- Use multifactor authentication and the company password manager on every work account. Never share passwords or login codes, not even with a manager.
- Never send or change wire or payment instructions based on email alone. Verify by phone at a known number, every time.
- Report suspicious emails, lost devices or possible incidents immediately to the CTO's team and the Admin Team.
- Keep confidential files in approved company systems, not personal email or personal cloud storage. Company systems may be monitored as the law allows.

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LOOKING AFTER EACH OTHER

Safety, growth & leaving

Safety on sites and in the office

- Follow site specific safety rules and wear required protective equipment on every visit.
- Report any injury, near miss or unsafe condition to your manager the same day.
- No weapons, threats or violence, and no working under the influence, on company premises or sites.

Feedback, performance and growth

- Expect regular, direct feedback from your manager, and give it back.
- Written reviews at 90 days and at least once a year after that.
- Concerns you can't resolve with your manager go to the Admin Team or Legal Operations. No retaliation, ever.

Leaving the company

- We ask for two weeks' notice so we can plan a good handoff.
- Return all equipment, documents and access on your last day.
- Final pay is provided on the schedule your state's law requires.



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WE'RE HERE TO HELP

Who to contact

Topic	Contact
Onboarding, scheduling, time off records, general questions	**Admin Team**, Jess Dumok admin@kaufmanfamilyoffice.com
Pay, benefits, expenses	**Finance**, Tom Wilson, Chief Financial Officer tom@thekaufmanco.com
Legal, compliance, conflicts, workplace concerns	**Legal Operations**, Eric Goldberg, Chief Compliance Officer and Head of Legal Operations eric@thekaufmanco.com
Systems and security	**Technology**, David Weston, Chief Technology Officer, and team
Candidate and team member portal	people.thekaufmanco.com

Handbook acknowledgment

I have received the Kaufman & Company Team Member Handbook, version 2.0. I understand it is my responsibility to read it and to ask about anything I don't understand. I understand the handbook is not a contract of employment, that my employment is at will unless I have a signed written agreement saying otherwise, and that the company may update the handbook.

Name	
Signature	
Date	
Employing entity	

Sign and return this page to the Admin Team, or complete the acknowledgment in Kaufman People.



Kaufman & Company

A permanent capital holding company

Kaufman People: people.thekaufmanco.com
thekaufmanco.com · admin@kaufmanfamilyoffice.com