ILLUSTRATIVE MANAGEMENT AND ADVISOR RECORD

Your Firm's Reputation Deserves a Record.

Public Digital Identity Observation Record

An independent history of defined public-facing observations, material changes, and recorded notices.

NORTHBRIDGE VALUATION PARTNERS

northbridge-valuation.example

Hypothetical history: Dec 2023 – Nov 2026

THREE-YEAR FICTIONAL SCENARIO

36	2	0
Dated observation events	Material findings recorded	Open findings at latest check

LATEST ILLUSTRATIVE OBSERVATION

No unresolved material findings observed

Within the defined sample scope, at the latest valid observation only. One past observation included an unavailable source.

Prepared for: Management retention and optional professional advisor review. This is a fictional demonstration; no live Hallstamp observation, notification, or timestamp is represented.

01 / PURPOSE AND PRACTICAL USE

Why this record exists.

Professional firms document work performed for clients. This record documents a different business dependency: the public-facing infrastructure through which clients and referral sources identify and reach the firm.

THE MANAGEMENT QUESTION

Your firm depends on its public-facing digital identity. Who independently observes and documents changes to it?

The answer this specimen illustrates: a defined, independent outside-in observation program, with dated records and documented exceptions.

Potential uses of this record

Possible reference uses, not guarantees of acceptance or usefulness in any particular legal, insurance, or business process.

Management files
Maintain a dated history of what the observation program covered and recorded.

Insurance discussions
Provide context to an insurance broker; not proof of insurability or a premium discount.

Attorney or dispute files
Identify historical observation dates, reported findings, and source limits.

Acquisition due diligence
Show public-facing continuity; private account control requires separate confirmation.

CPA and other advisor review
Give an external professional a concise, understandable record of observations.

Internal continuity reviews
Refer back to changes, missing observations, and subsequent outcomes.

The useful distinction: the record documents observations made and notifications issued. It does not, by itself, demonstrate that management reviewed, understood, or acted on those findings.

02 / EXAMPLE OF A RECORD ACCUMULATED OVER TIME

Three years in view.

The value is not one successful check. It is a sequence of dated observations that can be interpreted later. Every event below is fictional, including the historical dates.

2023
01
Initial baseline established in December

2024
12
Routine observations; certificate warning and later renewal

2025
12
Routine observations; one source-unavailable entry

2026
11
Routine observations; email-policy change and later restoration

Selected entries from the hypothetical observation ledger

DEC 2023	**Baseline**	Defined public surfaces recorded for the first time.
MAY 2024	**Finding 01**	Website certificate was approaching its recorded expiry date.
JUN 2024	**Later observation**	Replacement certificate observed; earlier condition no longer present.
OCT 2025	**Source unavailable**	Registration-data source did not respond; result recorded as unavailable.
NOV 2025	**Source restored**	Registration-data collection resumed; no invented value for missed period.
AUG 2026	**Finding 02**	Publicly published email-authentication policy changed.
SEP 2026	**Later observation**	Earlier email-authentication policy observed again.
NOV 2026	**Latest observation**	No unresolved material finding within the latest valid comparison.

36 dated events / 2 findings / 1 partial source-unavailable event

03 / PRINCIPAL VIEW

What the record says today.

Latest illustrative observation: November 1, 2026. The plain-language summary appears first; technical source details are in the appendix.

DESIGNATED PUBLIC SURFACE	LATEST SAMPLE OBSERVATION
Public website	The designated site responded over an HTTPS connection.
Domain routing	Published domain records were collected for comparison.
Business email settings	Public routing and authentication settings were observed.
Site certificate	The HTTPS certificate was within its recorded validity period.
Registration information	Available public registration data was collected.

Material findings documented in the sample history

01 / WEBSITE CERTIFICATE
Approaching expiry in May 2024; replacement observed in June 2024.

02 / EMAIL-AUTHENTICATION POLICY
Published settings changed in Aug 2026; prior policy observed again in Sep 2026.

Illustrative notification history: both findings demonstrate how a dated notice entry would appear. No actual email, findings PDF, or customer acknowledgment was generated for this fictional record.

04 / HOW TO READ AND USE IT

What an advisor can take from it.

A dated, limited record keeps observed facts separate from assumptions about intent, control, and management action. That distinction makes it straightforward to retain and to interpret.

DOCUMENTED BY THE OBSERVATION PROGRAM

- Named public surfaces were within the stated observation scope.
- Dated observations, changes, and unavailable collection events were recorded.
- Notification events are recorded when a notice is issued.

NOT ESTABLISHED BY THIS RECORD

- That the firm, its people, or its business relationships were verified or certified.
- Who privately controls registrar, Google, mail, or other administrator accounts.
- That management received, reviewed, or acted on an observation or notice.
- Security, legal compliance, prevention of fraud, or fitness for any insurer or regulator.

ADVISOR INTERPRETATION

This is a dated, limited record of outside-in observations. Any independent decision about risk, coverage, legal significance, or transaction readiness belongs to the relevant advisor or decision-maker.

05 / TECHNICAL SOURCE GUIDE

Methods behind the record.

This appendix is for reviewers who want to see exactly what an observation collects, and where its limits are. It is intentionally separate from the principal-facing summary.

OBSERVATION AREA	TECHNICAL METHOD / LIMIT
Domain configuration	DNS A, AAAA and NS record responses for the named domain.
Public email routing	MX responses, SPF and DMARC public DNS records.
Email authenticity settings	Configured DKIM selector lookups; presence only, not delivery testing.
Public website	HTTPS status, redirects, final address, and a response-body digest.
HTTPS site certificate	Validity dates, fingerprint, and chain and hostname check.
Public registration data	RDAP registration and expiry dates; unavailable results stay explicit.

ABOUT THIS SPECIMEN

The firm, events, and dates in this document are fictional. It illustrates the kind of record Hallstamp is designed to maintain over time. A monthly report is a shorter document and does not reproduce this layout. No real observation, notification, or timestamp is represented, and record contents and format may evolve.

QUESTIONS ABOUT HALLSTAMP

Write to us.

We're glad to explain how Hallstamp would work for a firm like yours. We reply in writing, and a call is always optional.

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