



We Solve 2 Existential Problems for Advisors

1

The Great Wealth Transfer

\$140T in next 20 years

\$84T

Advisors already suffer a loss of 7 out of 10 clients at wealth transfer.



Baby boomers

Gen X

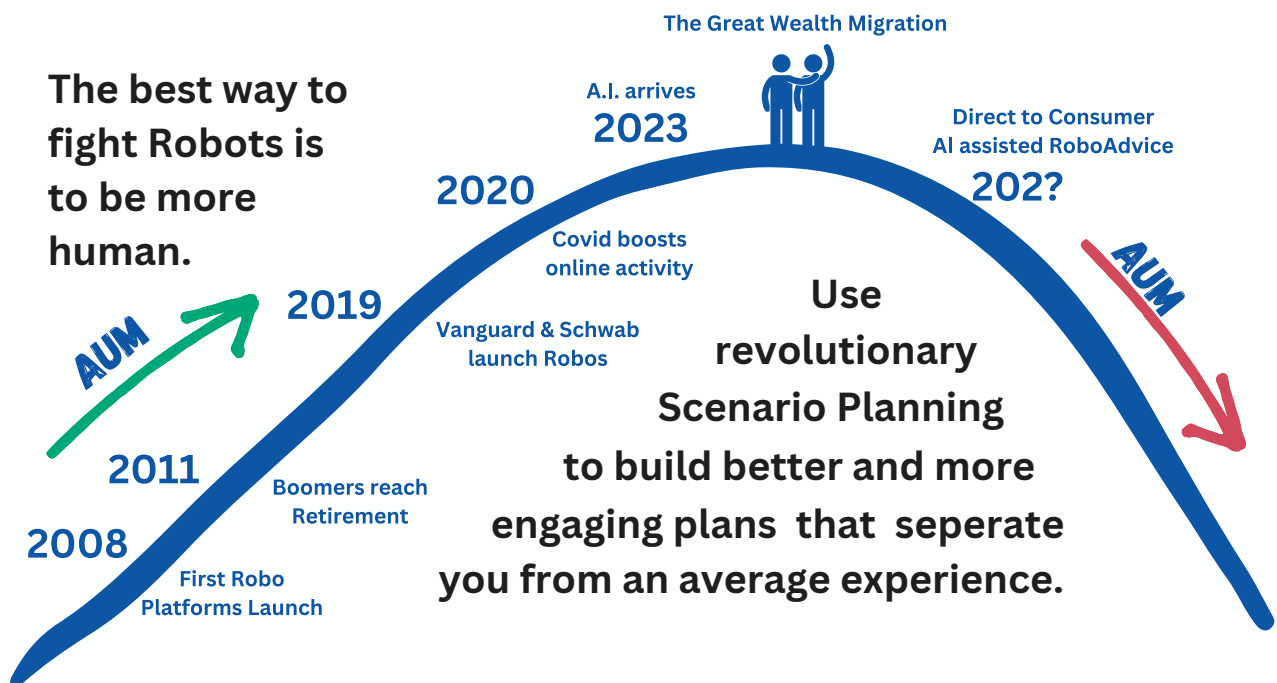
Millennial

Wealth is transferring from a group that hates tech to a group that thrives on it.

2

A.I. Assisted RoboAdvice

The best way to fight Robots is to be more human.





Free Account



PlanTech Basic

Streamlined | Pay-by-the-Plan | Monthly Commitment

\$5 / Month or \$50 / Year



MyPrivatePlan

For Your Eyes Only

Free



ProBonoPlan

Be a Hero

Free



ParaPlanTech

For Paraplanners

Free



FinLitYou

Self-Guided Learning

Free



StartingOutPlan

Direct-to-Consumer | Self-Driven Financial Literacy

Refer for Free or Sponsor at \$5/Month



Upgrade

Unlimited Clients | Customize Everything
Integrations | Team Collaboration

\$1,000 / Year or \$90 / Month