



Our Mission at Asset Planet is to make it easy for everyone to take charge of their financial life, from setting and achieving goals, to managing money and assets, to building wealth for richer and more rewarding today and tomorrow.

"Improving the financial journey of everyone, everywhere"



The Problem

Today, consumers and professionals face a daunting array of financial, budgeting, investment and banking apps and tools. Few of the apps talk to each other. Most are difficult to learn and use. Or are so simplistic as to be un-helpful. None provide a comprehensive, easy-to-use platform to manage a person's entire financial life, from budgeting, investing, legacy planning- across all life's chapters.



The Opportunity

More than 200 million people in the USA use online banking services. 162 million people own stocks. More than 87 million people have brokerage accounts. Approximately 70 million people have a 401(k) account. About 17% of Americans use a budgeting app.

Our Product

The Financial Life Dashboard- Asset Planet provides a single, powerful dashboard that tracks all your money matters. The interface combines engaging daily updates with advanced financial analytics running behind the scenes. Navigate easily using simple icons or talk to the AI assistant.

◆ Key Platform Capabilities

Organizer



- Comprehensive Asset Tracker
- Liability management
- Income monitoring
- Integrated calendar with intelligent reminders
- Secure document storage and sharing

Planner



- Advanced scenario modeling
- Goal-achievement algorithms
- Precision-driven financial projections

Protector



- Comprehensive risk mitigation strategies
- Resilience Framework designed to reduce stress
- Preparation for life's critical transitions

Comprehensive and easy to use



Asset Planet's fully integrated approach provides one dashboard with consistent functionality across modules making it easy to set up, learn and use in a completely secure environment.



Competitive Advantages

Asset Planet delivers a revolutionary platform through innovative, integrated architecture. Our unified source code powers seamless upgradability, robust security, and intuitive user experience. With an intelligent, customizable dashboard, we offer contextual alerts, collaborative tools, and lifestyle-integrated features that transform financial management beyond traditional boundaries.



Huge Addressable Market

Universally, humans aspire to achieve financial goals, optimize efficiency, minimize waste, and secure wealth for personal and legacy purposes. A key element is ease of use, and for the new generation, access to detailed information and quality results is paramount.

Consumers 216M TAM (USA)

Banking uses digital 216M and online trading accounts 135M
Examples include Acorns app 13M accounts, Mint.com 20M users at peak under Intuit. Half of US Consumers 100M use Plaid. 16.4M college 529 accounts. Last year 3M people died in USA, almost 1MM will get divorced, 3.5M homeowners insurance claims plus millions more for other insurance, 61% of Americans consider themselves collectors, according to Psychology today.

Professionals 5.1M TAM (USA)

Market sectors include advisors who file ADV's 531K, Divorce & Estate Lawyers 518K, CPA's and Enrolled agent 756K, Accountants & bookkeepers, 1.6M, Insurance Agents our application 1.7M, Funeral Home Sales agents 57K and more.

Detail and source in DECK or Business Plan

Institution 1K+ (USA)

Top 4 banks have approximately 150MM users with another 60MM plus and growing, Half of all users are using mobile apps to interact with their bank. As a white label licensee, we can help institutions gain and retain clients. Our software can be the perfect bridge between retail and professional.

Business Model/Marketing Strategy



Multi Channel Market



Upsell Opportunities



Freemium to paid



Revenue share/
co-monetization



Our marketing strategy focuses on two fundamental human motivators, aspirations and fears. Aspirations drive our need for building a career and family, accumulation, planning, organization - living well. Fears drive us to plan for disasters, disability, divorce and death.



The Ask/Use of Funds Raising \$5 million Seed:

- Expand team and launch platform
- Expand features for existing apps and add new ones
- Implement customer acquisition program



Ian Goldey CEO, Asset Planet

310-892-1192

818-643-5365

iang@assetplanet.com

Links

The Team

DECK

Investor Website