



# InvestNest

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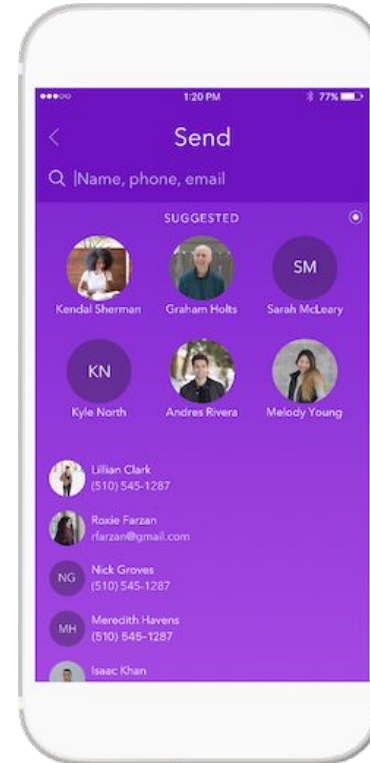


# Current state of the art social/financial products

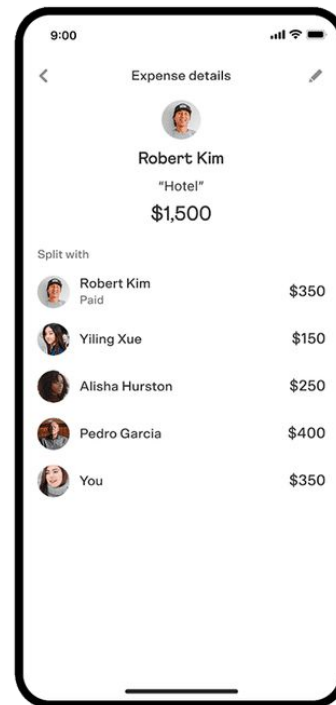
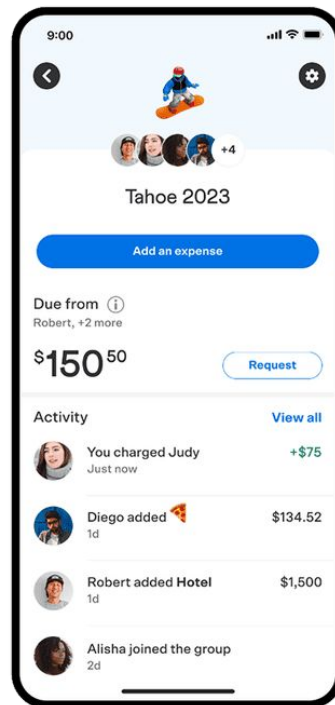
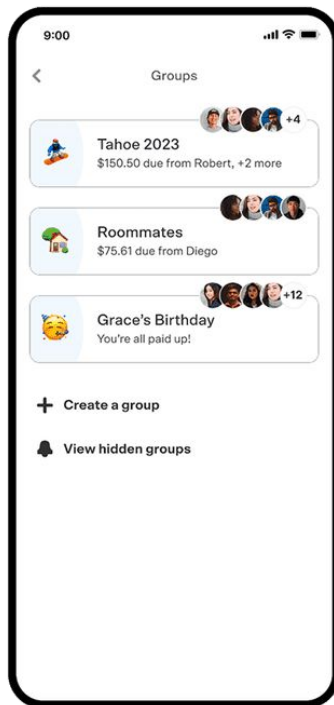
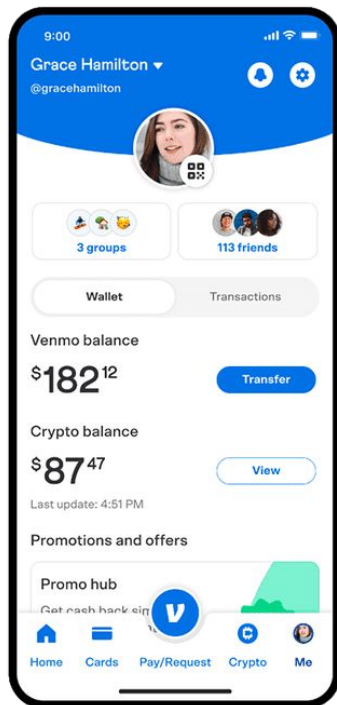
- **Webull** - is a trading platform where investors can engage with other investors on the app, they can discuss about stocks, trading strategies, and market trends.
- **Zelle** - a real-time payment app that is built into many traditional apps, which makes it very easy to send or receive money from friends and family, typically the money is sent or received within minutes.
- **Venmo** - a mobile payment app that allows users to send and receive money, has a social feed where users can see their friends recent transactions.



# Webull and Zelle social aspects



# Venmo social aspect



# What our app is...



- An app that provides educational resources, community support, and financial management to improve financial wellness
- Encourage people to undergo their financial journey with support from others
- Provides socially engaging activities within the app



# Strategy for Success...

- **Socially Integrated Financial Tracking**
  - Provide basic financial management tools (budgeting, goal-setting) that link to a user's financial accounts which can be shared to others
- **Community Challenges and Rewards**
  - There will be financial wellness challenges, such as saving a specific amount in 30 days which will in return gain the user digital rewards

# Strategy for Success...

- **Personalized Financial Learning Paths**
  - Provide educational content that is either basic personal finance tips to more advanced concepts
- **Gamification and Social Rewards**
  - Users will earn badges and points for completing goals, participating in community events, or contributing to discussions.
- **Peer-to-Peer Advice**
  - There will be Q&A sections where users can ask financial questions, share advice, and learn from others' experiences

# Innovative Ideas for App

- Community-Focused Financial Education
  - Users will work together and share tips via message boards/forums
  - Insightful advice backed up by good reception can award users in-app rewards that goes to their account (aka Reddit)
- User-Generated Content
  - Users will share their own content
  - Provide people with real ongoing financial content



# How it will disrupt market...

It will be one of the first apps where a community is able to work together and help each other achieve their financial goals.

- Most apps encourage a solo/isolated financial journey
- Inexperienced financial people will cater towards
- Premium model for app for the apps revenue where the user would get extra benefits (we gotta think of some)

# Disruption in the market

- We are one of the first social/finance apps to have a premium service model.
- The subscription includes weekly live workshops where premium members can join.
  - At the end of the workshops members will have a chance to ask the host questions.
  - This gives our members a chance interact with a financial expert
- People who want live workshops will start to use our app since other apps don't provide this service.

# Work Cited

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