

ZOE

F I N A N C I A L

MATCHING THE MASS AFFLUENT
WITH FINANCIAL ADVISORS

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THE PROBLEM



CLIENT



91% want financial planning rather than portfolio management



No data-driven way to qualify an advisor



Rely mainly on outbound sales & referrals



Lack a process of sourcing and converting leads



64% don't track number of leads



ADVISOR



SOLUTION

CLIENT

Zoe sources, qualifies, and matches clients with vetted advisors through a proprietary 20 factor matching algorithm.



ADVISOR



ADVISORS

5% Acceptance

We have a process in place to thoroughly vet advisors to ensure they have an exceptional quality of work and have the proper experience.

1

**CREDENTIALS
& EXPERIENCE**

2

**UNBIASED &
TRANSPARENT**

3

**CLEAN
RECORDS**

4

**COMPLETE
ASSESSMENT**



MARKET

MARKET
SIZE

16M

HOUSEHOLDS

MARKET
POTENTIAL

\$85T

INVESTABLE
ASSETS

X

1%

ADVISOR FEE

=

\$85B

REVENUE



TopPitchDeck

WHY NOW?



EDUCATED CLIENTS

Although “fiduciary ruling” failed to become law, it educated the consumer on advisors conflicts of interest



RIA MARKET

Independent Advisors now are near 30% of the market. 15 years back they accounted only for 10%

COMPETITION

ZOE
FINANCIAL
MANAGED

LISTINGS
**LIGHTLY
MANAGED**

REVENUE MODEL

ADVISOR CURATION

TRUST LEVEL

CUSTOMER EXP.

Advisor Listing Fee

NONE

LOW

LOW

Pay Per Lead

LOW

LOW

LOW

Revenue Sharing

HIGH

HIGH

HIGH

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BUSINESS MODEL

ZOE
CHARGES



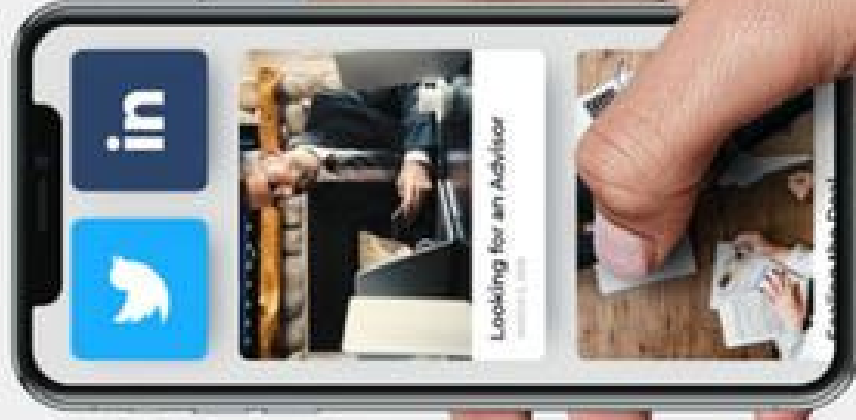
ADVISOR'S
RECURRING
REVENUE

✓ NO NETWORK FEES

✓ NO FEE PER LEAD

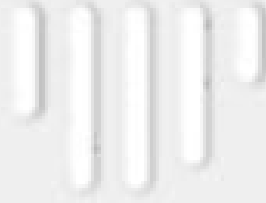
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MARKETING



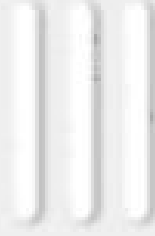
1

LEAD
GENERATION



2

ENGAGE &
EDUCATE



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TEAM



TEAM MEMBER 1



TEAM MEMBER 2



TEAM MEMBER 3



TEAM MEMBER 4



TEAM MEMBER 5



TEAM MEMBER 6

Source: <https://www.pexels.com/photo/abstract-3d-render-1000000000/>

INVESTORS



INVESTOR



INVESTOR



INVESTOR



INVESTOR



INVESTOR



INVESTOR

Source: [PitchBook](#) | [Crunchbase](#) | [PwC](#) | [Forbes](#) | [Statista](#)

MILESTONES



"The caliber of talent Zoe found was obvious. Night and Day."



"Zoe has become our most strategic partner. They have been a game changer for us."

**HAPPY
CLIENTS**

**MANAGED
ASSETS**

**ADVISOR
APPLICATIONS**

ROADMAP



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SUMMARY

MISSION

Zoe is empowering Americans to make better decisions about their financial life.

CONSUMER BENEFIT

With the click of a mouse, search & hire an advisor that provides advice rather than sell products.

ADVISOR BENEFIT

Outsource marketing and business development efforts at the click of a button so you can focus on servicing clients rather than being a sales person.



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