

Al-Powered Personal Finance Management





PERSONAL FINANCE IS LIKE TANK TACTICS





BUDGETING IS YOUR ARMOR. INVESTING IS YOUR FIREPOWER

SITUATIONAL AWARENESS

→ Financial Overview

Real-time insight into balances, budgets, and spending

PROTECTION

→ **Emergency Fund**

Savings for a rainy day, shielding against financial shocks

FIREPOWER

→ Investment Power

Savings plans, debt reduction to build financial strength

MOBILITY

→ Flexibility

Cancel subscriptions, knowing your credit lines



01.04.2024 ATM Witthdrawal COOP 204.59 -28,90 01.04.2024 Bus Pass PAYMENT 17,60 -18,90

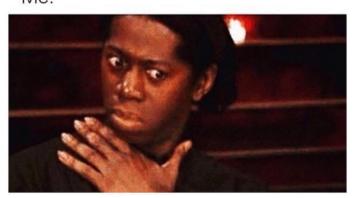
TODAY'S REALITY: LOST IN TRANSACTIONS

01.04.2024 Gym Management 01.04.2024 Supermarket 30.04.2024 Restaurant 30.04.2024 ATM Withdrawal

Me: "I'm guessing I should probably have about \$200 left"

Bank account: \$3.62

Me:



30.04.2024 Hotel de Eusio 30.04.2024 Fashlon Outlet 30.04.2024 Bookstore 30.04.2024 Bookstore Restaurant 11,69 -11,45 *TFFEE* -22,73 18,85 APPM -23,10 -17,20 PAYMENT 30.38 -30,20

HOTEL
SHOPPAY
PAYMENT
TRAVEL
Bookstore
Bus Pass
MIGRO
APPM*

RESTOURANT

APPMP

TRRAYBAN

METRAVE

TRAVELAGCY Restaurant MIGROS

Payment -19,67 -19,90
Puschase 33,92 -34,90
Bookstore 32,20 -23,10
ATM -16,59 -17,30

Mom always said: "Work until your bank account looks like a phone number."



(Available balance: \$9.11)

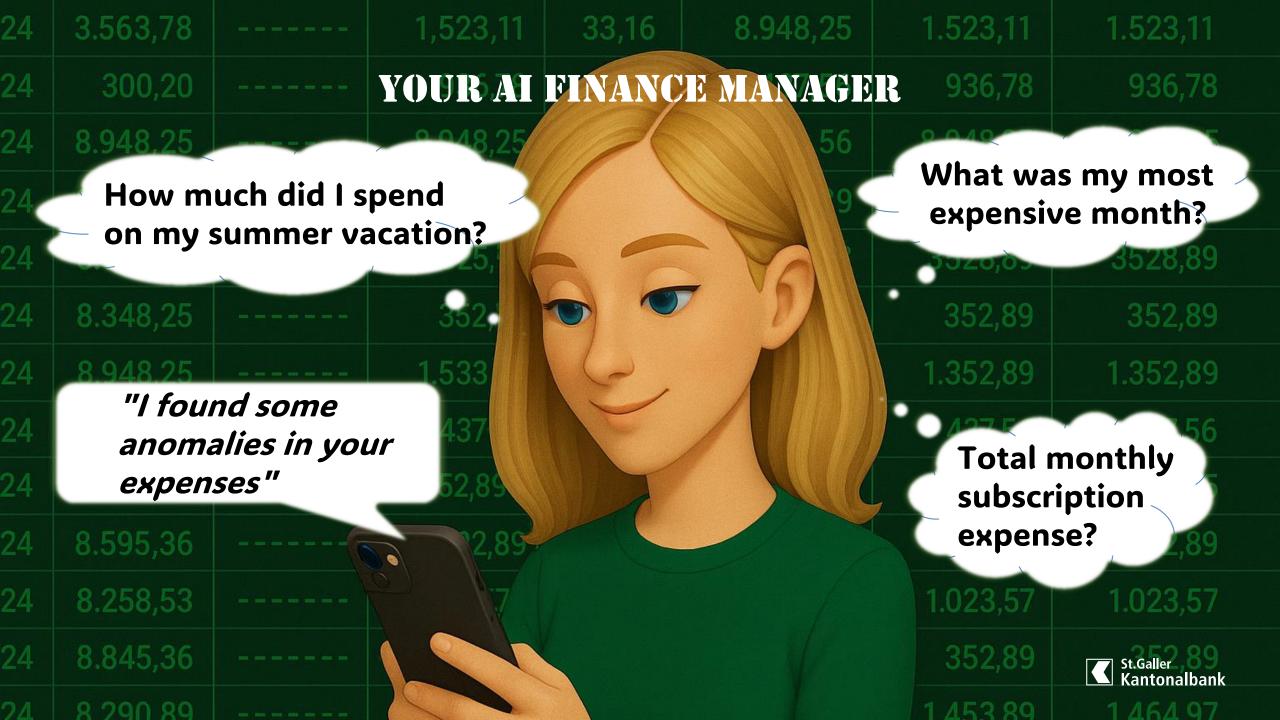


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01.04.2024
         ATM Witthdrawal
                                         -28,90
                                204,59
01.04.2024
                                         -18,90
         Bus Pass
                        PAYMENT
                                 17,60
01.04.2024
                    PERSONAL FINANCE = LOST IN TRANSACTIONS
01.04.2024
          Spotify
01.04.2024
          Gym Management
01.04.2024
                                         18,85
         Supermarket
                        *TFFEE*
                                -22,73
30.04.2024
          Restaurant
                                         -17,20
                         APPM
                                -23,10
30.04.2024
          ATM Withdrawal
                        PAYMENT
                                 30,38
                                         -30,20
30,04,2024
          Burger Palace
                                -29,39
                                         -18,45
                         HOTEL
30.04.2024
                                         -12,90
          Swisscom
                        SHOPPAY
                                -10,60
30.04.2024
          Petrol Station
30.04.2024
           → Users have no overview of their expenses
30.04.2024
30.04.2024
                                         -14,60
30.04.2024
                                -25,80
                   Patterns and recurring payments are invisible
30.04.2024
30.04.2024
30.04.2024
           ym Membersship
30.04.2024
             --- No intuitive tool that provides instant answers
30.04.2024
30.04.2024
                                         -11.80
30.04.2024
30.04.2024
          Restaurant
                                         -13,90
                        MIGROS
                                -26.35
30.04.2024
                                         -19,90
          Hotel de Eusio
                        Payment
                                -19.67
30.04.2024
          Fashlon Outlet
                        Puschase
                                 33,92
                                         -34,90
30.04.2024
         Bookstore
                                         -23,10
                        Bookstore
                                 32.20
30.04.2024
         Bookstore
                                -16.59
                                         -17,30
                                          21 00
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DAVMENT





FROM INSIGHT TO ACTION



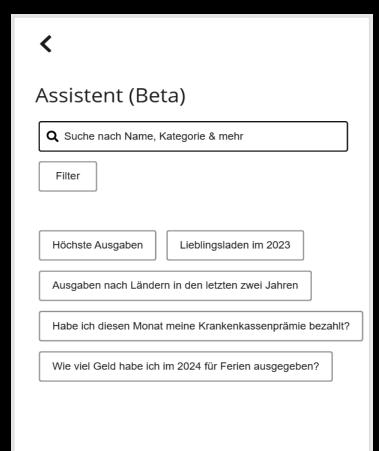
Al Finance Assistant

Der Assistent ist eine neue Beta-Funktion, die aktuell exklusiv für SGKB-Mitarbeitende verfügbar ist und sich in der Testphase befindet.

- Mit der Funktion kannst du:
- Deine Ausgaben nach Kategorien analysieren
 - Fragen zu deinen Finanzen stellen
 Einblicke in deine Ausgaben und Einnahmen gewinnen

1200000

Abbreche



What we want to achieve:

- → Increased financial awareness
- → Stronger loyalty to the bank
- → Unlock gamification potential



THANK YOU FOR YOU SUPPORT!



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