

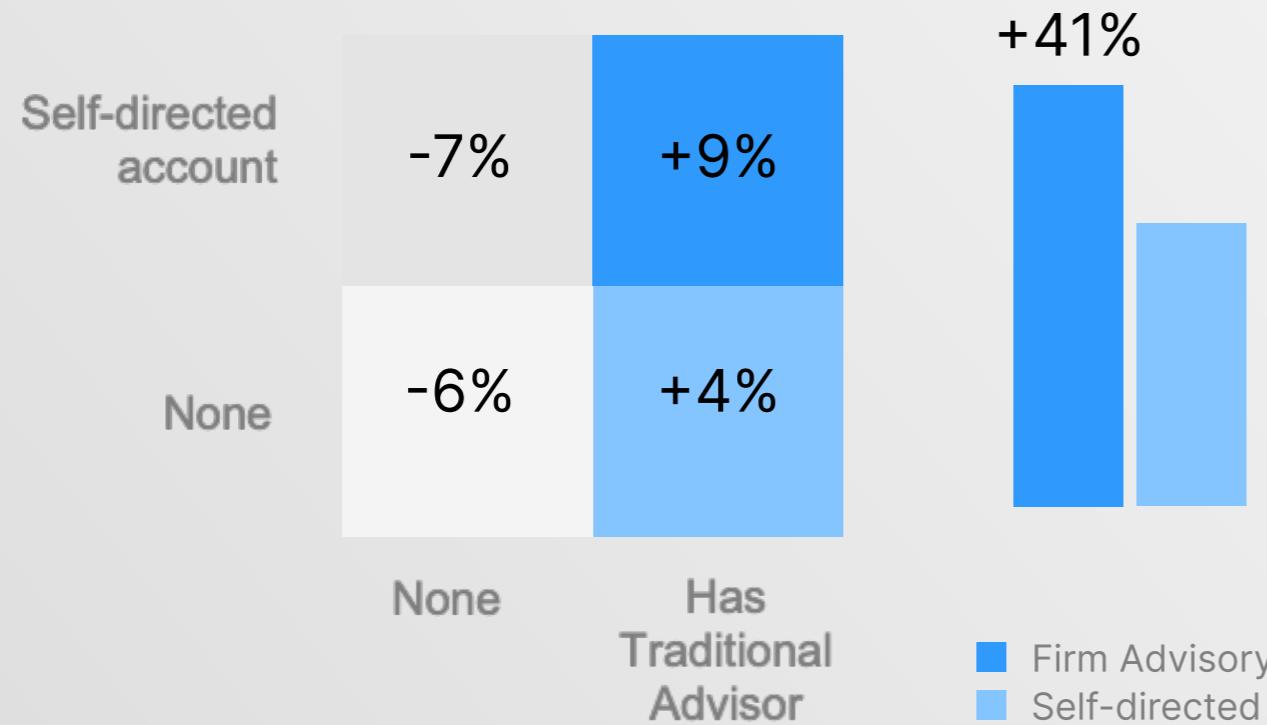
GuidedWealth

All-in-one social wealth management
platform for clients from all walks of life

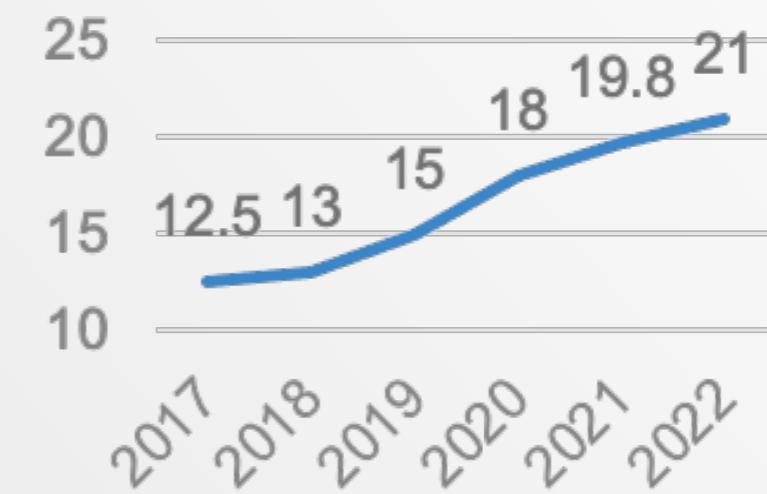
Team Harry Winners

Uncertain investment environment creates a need for professional perspective

Investors **prefer advisory services** over self-directed approach



Clients prefer to consolidate wealth and banking for **better relationship deals**



Client Preference towards better banking relationships

Wealth management **must improve client relationships** in environment of uncertainty

Sources: McKinsey & Co. & Accenture

\$961 ↓

Overall Gains/Losses



\$120k

Total Income

Current Yield

Delta

Quantity

Symbol

Unit Cost

Unrealised Profits and Losses

-6.503177796987412

50

-1.4541153785860708

23

-7.607326590433033

56

-6.554704962642193

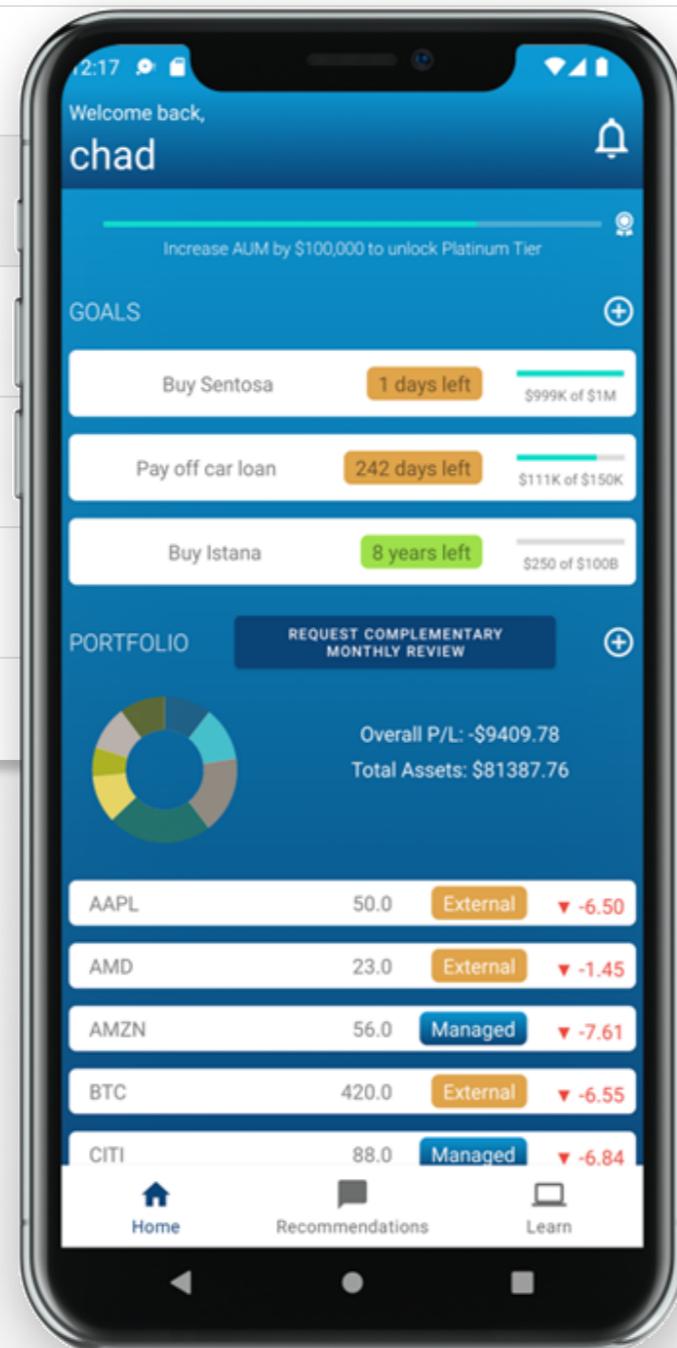
420

-6.8357378527004915

88

8.167055455458655

550



GuidedWealth

All-in-one **social wealth management** platform for clients from **all walks of life**

How do we improve client-advisor relationships and integrate existing services?

Strengthening Banker-Client Relationship

Access to professional advice

Services right at your fingertips

Build lasting relationships with clients from the ground up

Build reputation and credibility among customers





Chad

- Fresh Graduate
- Casual Investor
- Not sure how to invest monthly income wise
- Tons of generic information online



Clients

- Set financial goals
- Consolidate portfolio
- Free access to professional advice

The image shows two smartphones side-by-side, both displaying the GuidedWealth mobile application interface.

Top Phone Screen (Goals):

- Welcome back, chad
- Increase AUM by \$100,000 to unlock Platinum Tier
- GOALS**
- Buy Sentosa: 1 days left (\$999K of \$1M)
- Pay off car loan: 242 days left (\$111K of \$150K)
- Buy Istana: 8 years left (\$250 of \$100B)

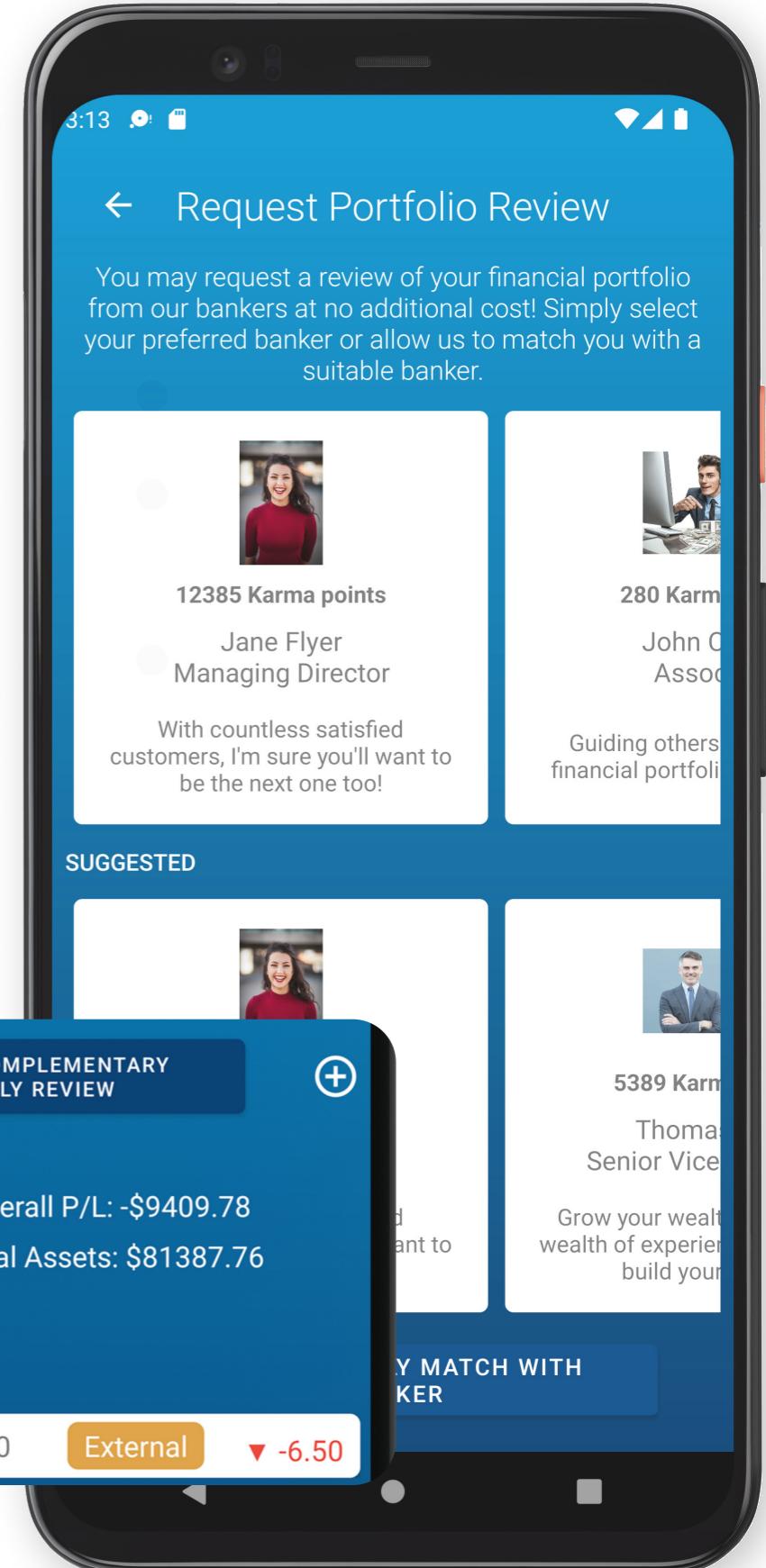
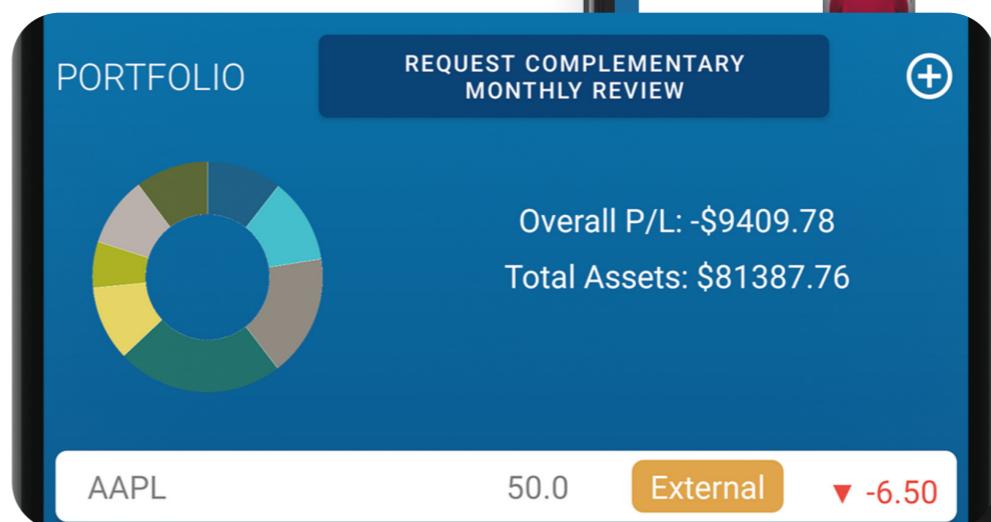
Bottom Phone Screen (Portfolio):

- Overall P/L: -\$9409.78
- Total Assets: \$81387.76
- REQUEST COMPLEMENTARY MONTHLY REVIEW**
- PORTFOLIO**
- Overall P/L: -\$9409.78
- Total Assets: \$81387.76
- AAPL: 50.0 (External) ▼ -6.50
- AMD: 23.0 (External) ▼ -1.45



Clients

- Set financial goals
- Consolidate portfolio
- **Free access to professional advice**





Clients

- Set financial goals
- Consolidate portfolio
- **Free access to professional advice**

The smartphone screen shows the 'YOUR RECOMMENDED CHANGES' section with four items:

Symbol	Name	Type	Current	Proposed
AAPL	Apple	External	50.0	-23.0
AMD	AMD	Managed	23.0	-10.0
BTC	Bitcoin	External	420.0	-30.0
DBS	Dbs bank	External	550.0	-5.0

Below this is the 'BANKER'S COMMENTS' section with a message: "These changes should suit your risk appetite better while having some safety net for your future plans. You're on the right track, just need someone experienced by your side :)"

Underneath is a contact card for "Jane Flyer" with the following details:

	Name: Jane Flyer
	Email: Hidden
	Office: 62353535
	Phone: 82738393
	Telegram: Hidden

At the bottom are two buttons: 'ACCEPT SUGGESTION' and 'TAKE ACTION (ONLY FOR FULLY MANAGED HOLDINGS)'. The navigation bar at the very bottom includes 'Home', 'Recommendations', and 'Learn'.



GuidedWealth

Clients

All Clients

Requests

Articles

Articles

Bankers

- **Acquire new clients and view current requests**
- Share knowledge through articles
- Boost reputation while earning karma points

Requests

Name	Client Type	Banker	Capital	Overall Profits and Losses	Recurring In
Chad	PLATINUM	Rehoho	72621.5100649387	-9409.781773920115	168099.683

Goals

- Buy Sentosa (\$999k of \$1M)
- Pay off car loan (\$111K of \$150k)
- Buy Istana (\$250 of \$100B)



\$961

Overall Gains/Losses

Description

Current Yield

Delta



Clients

All Clients

Requests

Articles

Articles

Bankers

- Acquire new clients and view current requests
- Share knowledge through articles
- Boost reputation while earning karma points

What are REITs?



Jane Flyer

Managing Director

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120 231 1629

What are ETFs?



Jane Flyer

Managing Director

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Bankers

- Acquire new clients and view current requests
- Share knowledge through articles
- **Boost reputation while earning karma points**



Jane Flyer 12385 karma points

Privacy!

Contact Sharing

Share All

Telegram: @gobigorgohome

Email: jane_flyer@ct.com

Phone: 82738393

Office: 62353535

Quantity

BUY SELL Other

Save

Send



Jane

- Managing Director
- Wants to continue serving more clients
- Hopes to share knowledge and years of experience with others

Positive Feedback Loop

Automatically matched with more highly-valued clients

Banker answers and gets karma points

Improved reputation leads to more clients

More karma points leads to improved reputation

SUGGESTED



12387 Karma points

Jane Flyer
Managing Director

With countless satisfied customers, I'm sure you'll want to be the next one too!



5389 Karma

Thomas Smith
Senior Vice

Grow your wealth of experience and build your

What are ETFs?

12 upvotes

2986

11 Aug 2022



Jane Flyer
Managing Director

12385 Karma points

Starting with Small Investments

12 upvotes

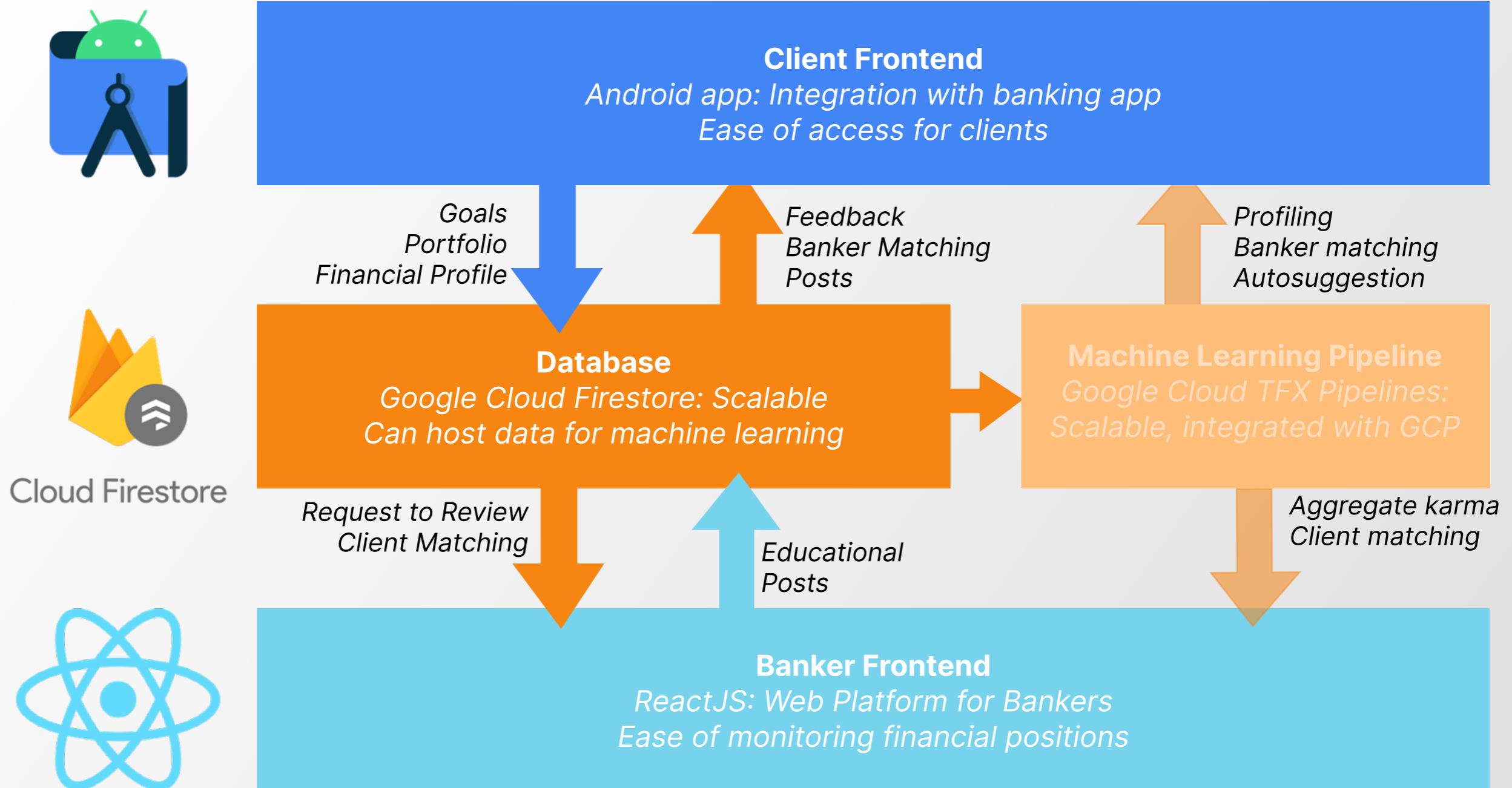
68

09 Aug 2022



Tom Tucker
Analyst

378 Karma points



GuidedWealth

GuidedWealth

Clients

All Clients

4:14

YOUR RECOMMENDED CHANGES

AAPL: Apple	External	50.0	-23.0
AMD: AMD	Managed	23.0	-10.0
BTC: Bitcoin	External	420.0	-30.0
DBS: Dbs bank	External	550.0	-5.0

BANKER'S COMMENTS

This changes should suit your risk appetite better while having some safety net for your future plans. You're on the right track, just need someone experienced by your side :)

Name: Jane Flyer
Email: Hidden
Office: 62353535
Phone: 82738393
Telegram: Hidden

ACCEPT SUGGESTION

TAKE ACTION (ONLY FOR FULLY MANAGED HOLDINGS)

Home Recommendations Learn

Recurring Income
\$500.00

Overall Gains/Losses
\$961

Total Asset Value
\$203k

Total Income
\$120k

Description	Current Yield	Delta	Quantity	Symbol	Unit Cost	Unrealised Profits and Losses
Apple	2	-6.503177796987412	50	AAPL	0	0
AMD	2	-1.4541153785860708	2			
Amazon	0	-7.607326590433033	5			
Bitcoin	0	-6.554704962642193	4			
Citibank	0	-6.8357378527004915	8			
Intel						
Standard and Poor 500						
Vanguard Total Stock Market						

SUGGESTED

What are ETFs?
12 upvotes 2986 11 Aug 2022

Jane Flyer Managing Director 12385 Karma points

Starting with Small Investments
12 upvotes 68 09 Aug 2022

Tom Tucker Analyst 378 Karma points

Karma points
Thomas Rich Vice President

wealth with me. My experience will help you build your wealth.

561 Karma
Michael R. Assoc.

I enjoy taking risks, but I always do my research and take calculated risks, only well calculated ones.