

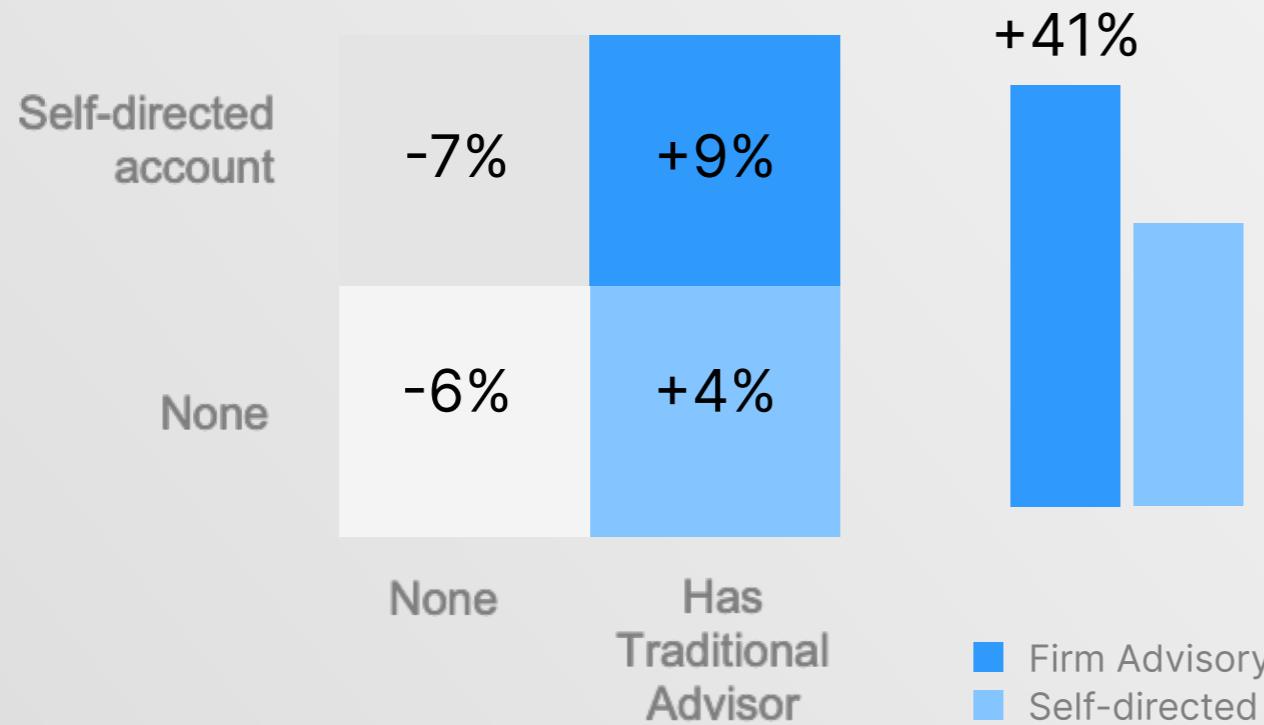
# GuidedWealth

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

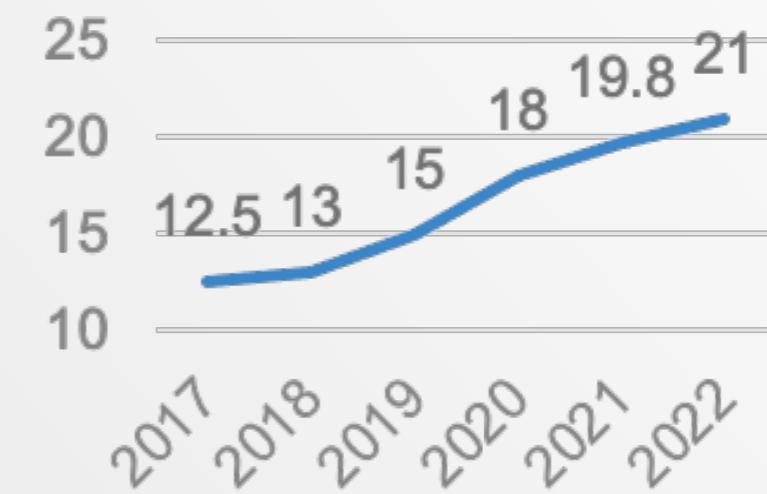
**Team Harry Winners**

# 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

AAPL

0

0



-1.4541153785860708

23

AMD

0

0



-7.607326590433033

56

AMZN

0

0



-6.554704962642193

420

BTC

0

0



-6.8357378527004915

88

CITI

0

0



8.167055455458655

550

DBS

0

0



# 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





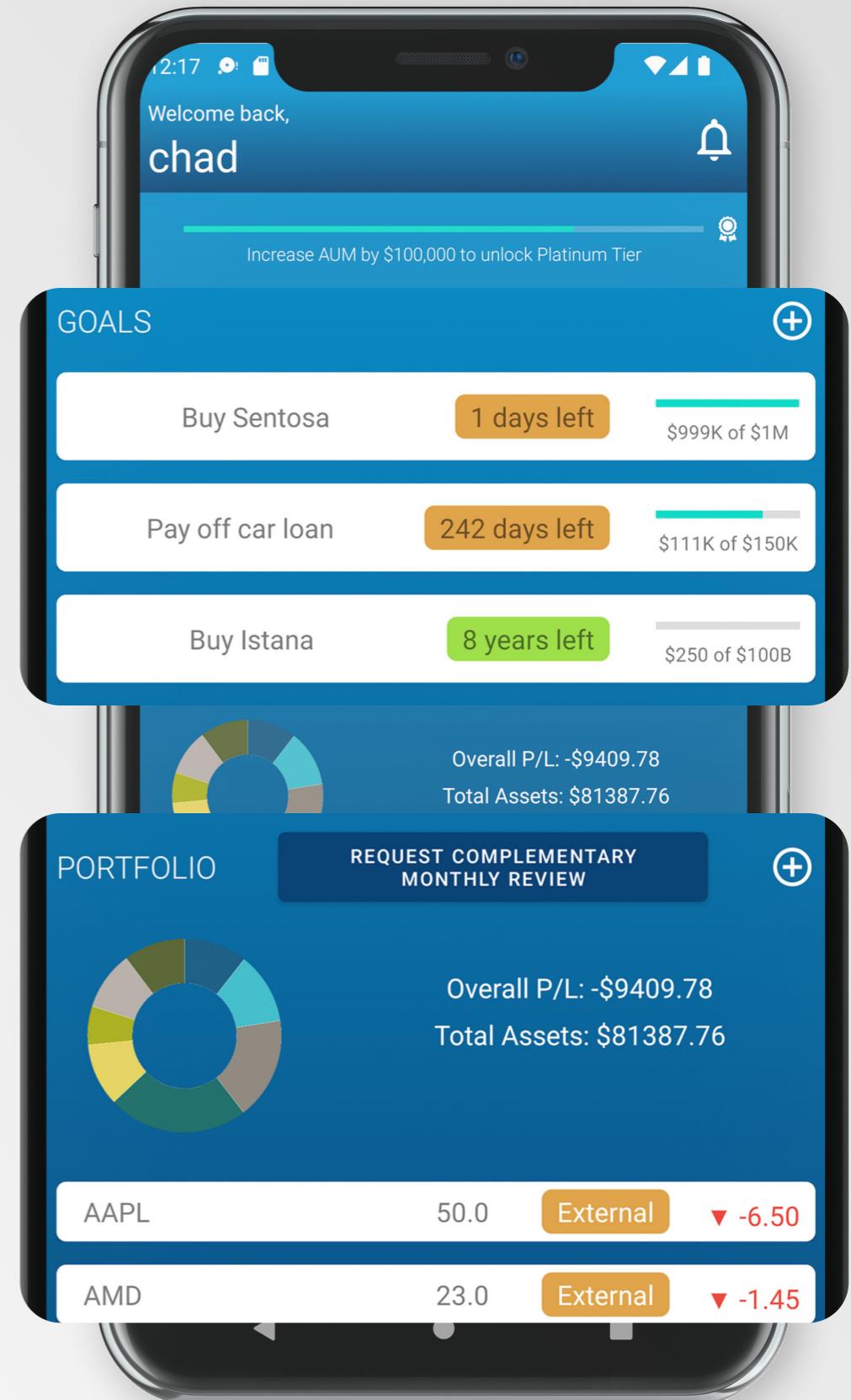
## **Chad**

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



# Clients

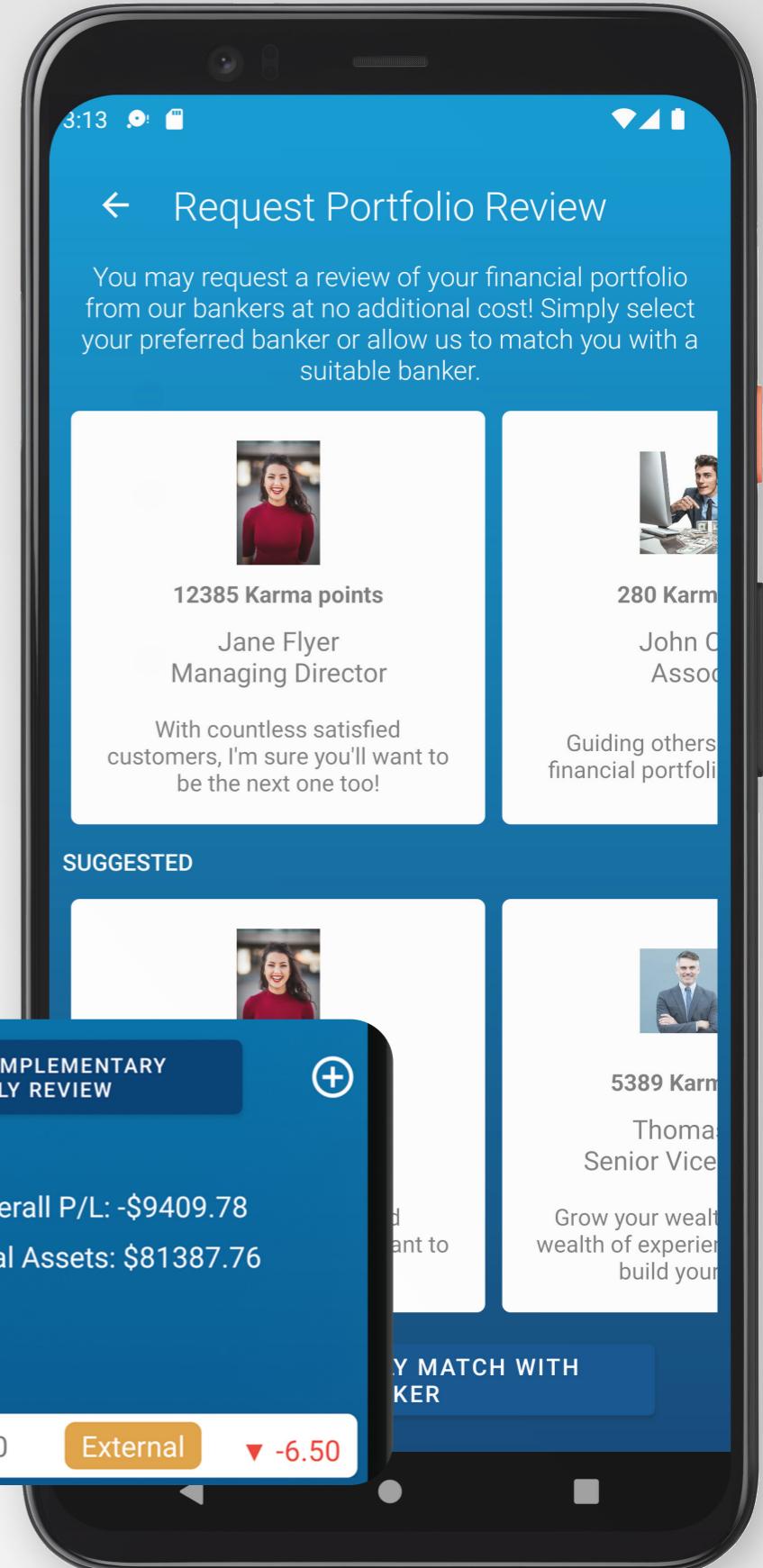
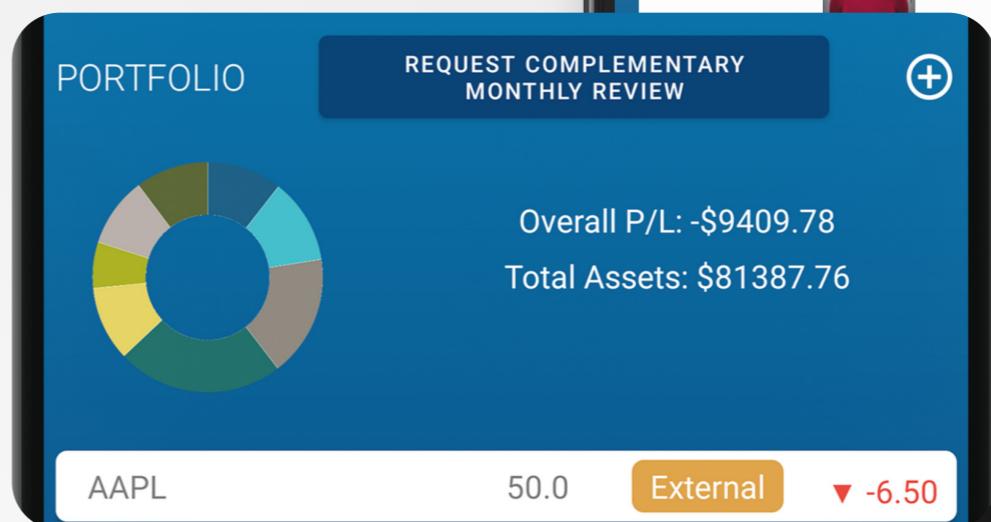
- Set financial goals
- Consolidate portfolio
- Free access to professional advice





# 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 displays the GuidedWealth mobile application. At the top, it shows "YOUR RECOMMENDED CHANGES" with four items:

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

Below this is a section titled "BANKER'S COMMENTS" containing 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 card for a client named Jane Flyer, with contact information: Name: Jane Flyer, Email: Hidden, Office: 62353535, Phone: 82738393, Telegram: Hidden. Below the card is a blue button labeled "ACCEPT SUGGESTION".

At the bottom is a grey button labeled "TAKE ACTION (ONLY FOR FULLY MANAGED HOLDINGS)". The navigation bar at the very bottom includes "Home", "Recommendations", and "Learn" buttons.



# 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 points  
Thomas  
Senior Vice  
  
Grow your wealth of experience and build your

**What are ETFs?**

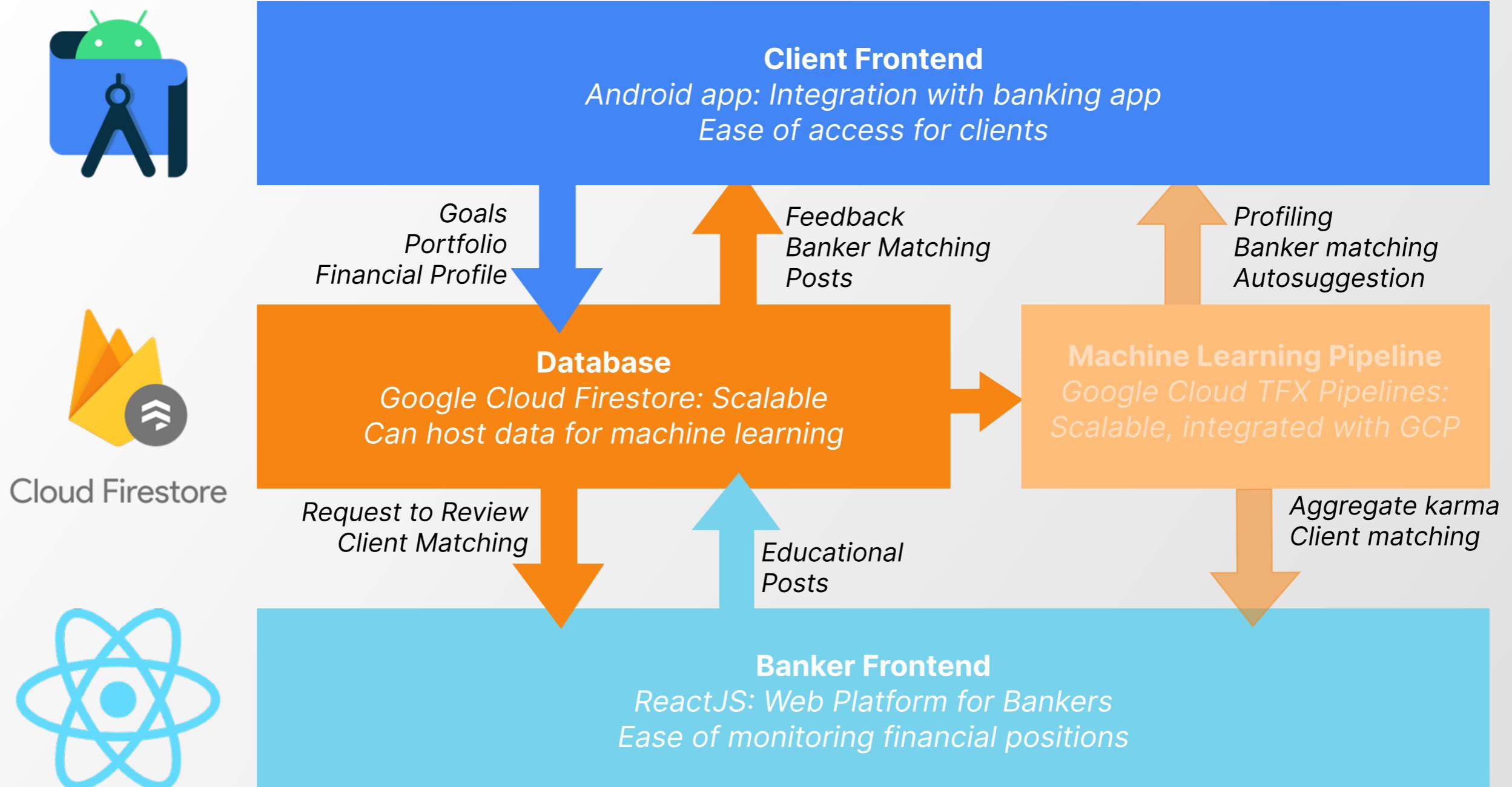
12 upvotes 2986 11 Aug 2022

 Jane Flyer  
Managing Director 12385 Karma points

**Starting with Small Investments**

12 upvotes 68 09 Aug 2022

 Tom Tucker  
Analyst 378 Karma points



# GuidedWealth

4:14 4G

YOUR RECOMMENDED CHANGES

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

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 :)

ACCEPT SUGGESTION

TAKE ACTION (ONLY FOR FULLY MANAGED HOLDINGS)

Home Recommendations Learn

GuidedWealth

Clients All Clients

Recurring Income: \$500.00

Overall Gains/Losses: \$961

Total Asset Value: \$203k

Total Income: \$120k

Jane Flyer 12385 karma points

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						

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 P. Assoc

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