

KNIGHTS OF THE



A look at interactive investing for Wealthsimple

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INTRODUCING SIR LANCELOT

A “tamagotchi-like” virtual pet for every Wealthsimple user. Through gamification, users will make purchases which translate into deposits for their Wealthsimple accounts. Overtime, users will also accumulate additional dollars managed for free by completing and maintaining certain asks.

Goals:

- Enable interactive investing habits for the users of Wealthsimple
- Build a long-term relationship with the users
- Witness tangible returns of their portfolio in a visualized manner

WHY SIR LANCELOT?

We've noticed:

- Wealthsimple users may make one-time deposits or turn on auto deposits - both are not high engagement activities
- Greater interaction with an application builds customer loyalty and “stickiness”
- Increased activity will also lead to organic/WOM growth

We will also present how our idea is highly applicable to many business use cases beyond its core feature.

- Example: The current referral program is lazy





SIR
LANCELOT



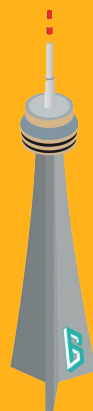
PUMPKIN



TFSA

RRSP

HISA



Earn \$0.48 every 18
hours for the user

WEB APP DEMO

REFERRAL PROFILE DEMO

KNIGHTS OF THE ROUND TABLE CORDIALLY INVITES YOU TO:

Take care of your pet,



and let your pet take care of you