

A large, stylized fingerprint graphic in shades of blue and black, serving as a background for the SUMA logo.

SUMA

**THE LARGEST
MOST TRUSTED
FINTECH PLATFORM
FOR LATINO YOUTH**

WSJ

Inc.



FORTUNE



Forbes



The Atlantic



PROBLEM

LATINOS ADD \$3.4 TRILLION TO THE US ECONOMY, YET:

Financial platforms do not know how to cater to their unique cultural needs

They do not trust large financial institutions

Lag in retirement savings and overall wealth-building.



SUMA™

Is an all-in-one financial platform that leans hard into Latino and pop culture, to make finances fun and relatable.

WE ARE ON A MISSION TO HELP CLOSE THE WEALTH GAP.



- Minority owned & certified
- Latina led
- LGBTQIA+



OUR USERS



80%

GenZ (18+)
and Millennial



65%

Female

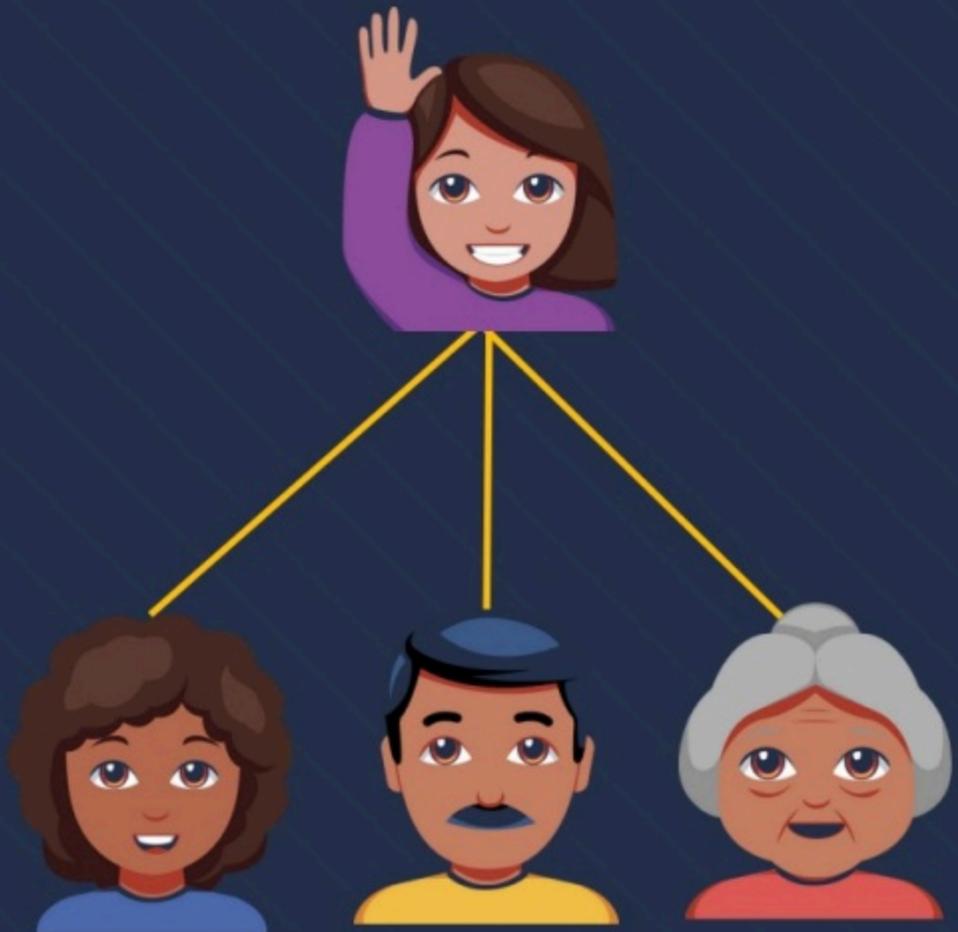


70%

Latino and 30%
general market

3X THE LATINO YOUTH
MULTIPLYING EFFECT

Our users manage the finances
for up to 3 family members



THE SUMA EFFECT

OUR APPROACH IGNITES
COMMUNITY ENGAGEMENT
AND GROWTH



1M
USERS

2.5X

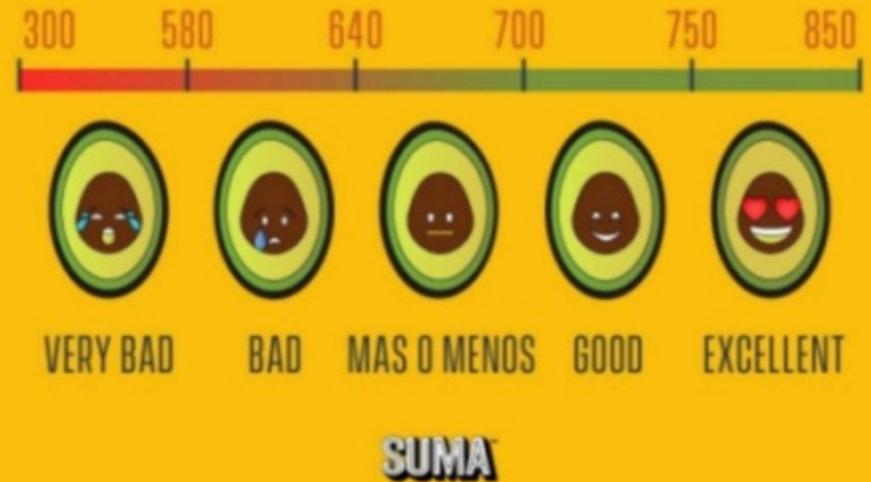
INCREASE IN SAVINGS COMPARED
TO THE NATIONAL AVERAGE

WE DON'T JUST TALK TO OUR
USERS; WE DELIVER FINANCIAL
LITERACY IN A WAY THAT
SPEAKS TO THEIR CORE VALUES

17X

That's why we have
unparallel engagement, at
17X higher than the
industry average

GUACAMALO OR GUACAREADY:
How ripe is your credit score?



50/30/20

Flan Budget Method

50%
ON YOUR
NEEDS



20%
ON YOUR
"GOALS"

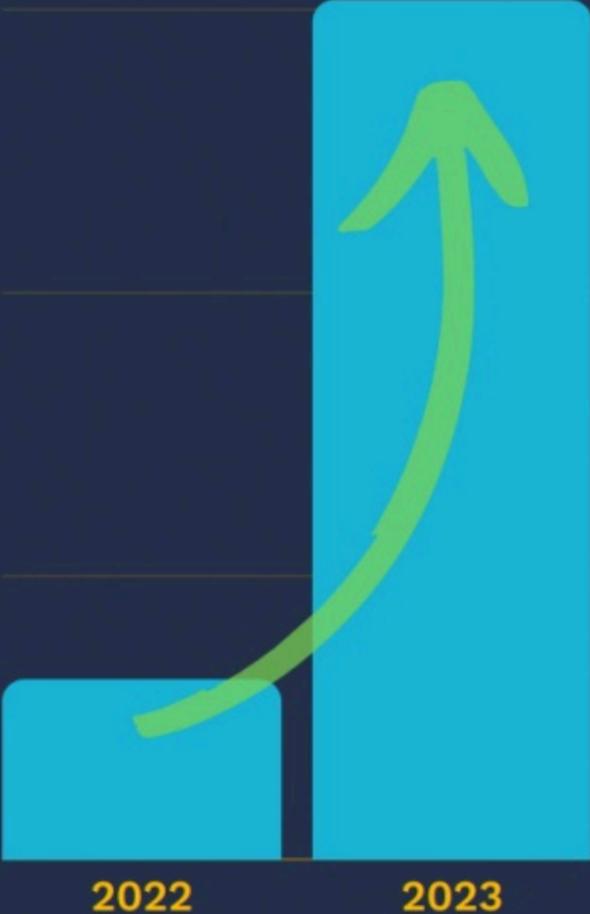
30%
ON YOUR
WANTS

Just try a piece and drool over your ahorros

FROM REVENUE TO COMMUNITY, 2023 WAS A YEAR OF GROWTH

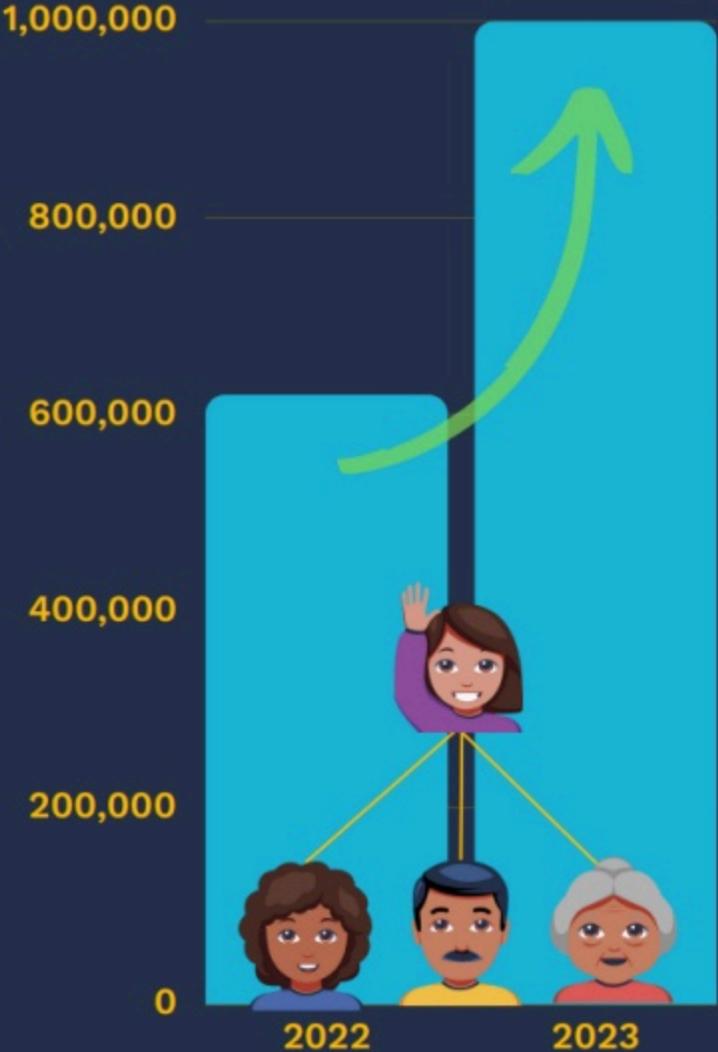
4.8X

Secured
Revenue Growth



61%

User Growth

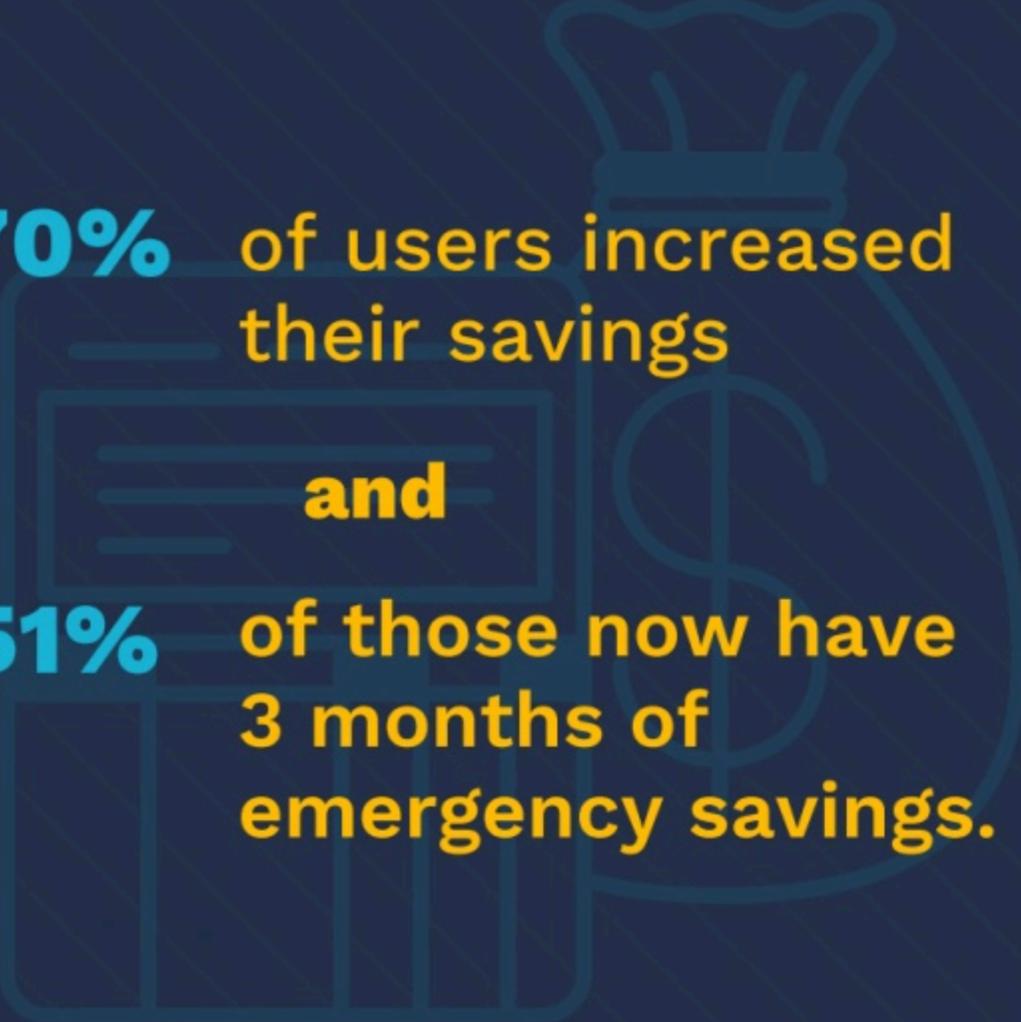


Increase in User Savings

70% of users increased their savings

and

51% of those now have 3 months of emergency savings.



PROVEN MODEL

Our innovative value proposition of financial culture as a service has led us to work with some of the largest companies in the US

87%

REPEAT RATE



Morgan Stanley

CHASE 

 **Fidelity**
INVESTMENTS

 **stockpile**TM

 **SBA** U.S. Small Business Administration

match 

 **WELLS FARGO** Wells Fargo Foundation

 **intuit**  **turbotax.**

 **intuit** **QuickBooks.**

verizon 

 **ASU** Arizona State University

 **REALTOR**[®]

SUMATM



THE SUMA MEMBERSHIP

UNLOCKING THE LATINO WEALTH BUILDING POTENTIAL



Money Management



Tailored financial tools



In-Culture content



AI Financial Coaching



Family Co-Savings



Gamified Education



BUSINESS MODEL

Sales Revenue

Memberships

Non-dilutive

Lead Generation
Amplification
Consumer Insights

Direct to Consumer
Enterprise
Community Partners

Financial Literacy
Educational Certifications



LANDSCAPE

No-one owns
Latinos in Fintech
the way we do!

	 MoneyLion®	ROCKET	 CLEO	 SUMA
EDUCATION	✓		✓	✓
COMMUNITY				✓
SOLE FOCUS ON LATINOS				✓
MONEY COACH	✓	✓	✓	✓
SAVINGS	✓	✓	✓	✓
AI INSIGHTS	✓	✓	✓	✓
REWARDS/ GAMIFICATION	✓		✓	✓



OUR THEORY OF CHANGE

Young Latinos are the influencers of their families and communities.

They are critical accelerators in closing the wealth gap within one generation.

OUR WORK HAS A LARGE FOOTPRINT & COLLECTIVE IMPACT



Beatriz Acevedo
CEO & Co-Founder
3X FOUNDER



Mary Hernandez
COO & Co-Founder



Xavier A. Gutiérrez
Chairman & Co-Founder



Daniela Corrente
Chief of Strategy and BD



Silvia Patiño
Head of Product



Kennit Ruiz
Head of Engineering



Our founders are board members and advisors to the leading non profit and B Corp organizations in the U.S.

Our relationships as community leaders are unprecedented.





**THANK YOU FOR TAKING
THE TIME TO LOOK INTO SUMA**

**OUR SEED ROUND IS
NOW OVERSUBSCRIBED!**

Feel free to reach out if you
are a mission aligned investor.





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