



ZOE

FINANCIAL

MATCHING THE MASS AFFLUENT
WITH FINANCIAL ADVISORS

THE PROBLEM



CLIENT



91% want financial planning rather than portfolio management



No data-driven way to qualify an advisor

Rely mainly on outbound sales & referrals



Lack a process of sourcing and converting leads



64% don't track number of leads



ADVISOR

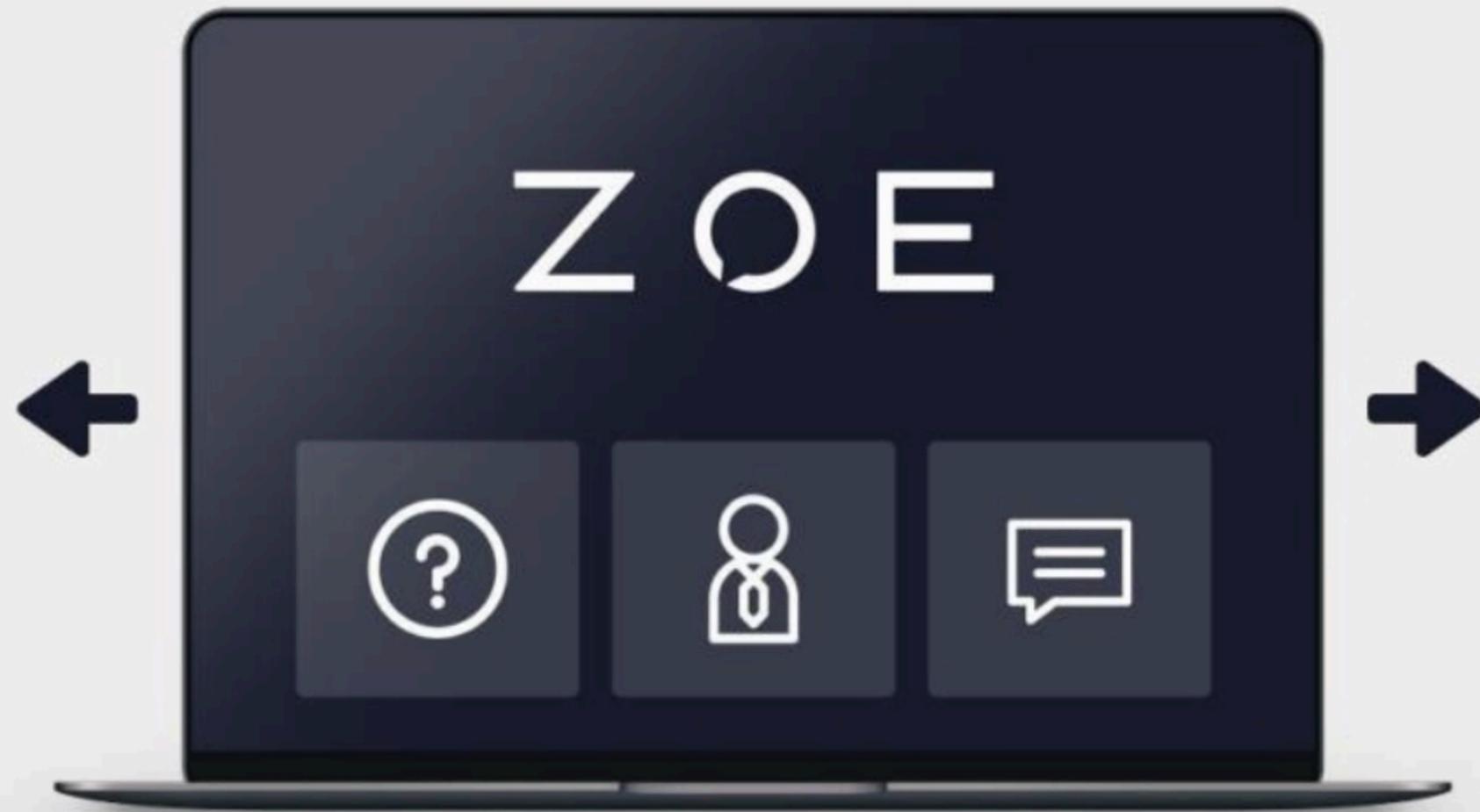
SOLUTION

CLIENT

Zoe sources, qualifies, and matches clients with vetted advisors through a proprietary 20 factor matching algorithm.

ADVISOR

- 
Qualified Advisors
- 
Instant Communication
- 
Smooth Experience



- 
Delightful Profile
- 
Client Generation
- 
Practice Analytics

ADVISORS

5% Acceptance

We have a process in place to thoroughly vet advisors to ensure they have an exceptional quality of work and have the proper experience.

1

**CREDENTIALS
& EXPERIENCE**

2

**UNBIASED &
TRANSPARENT**

3

**CLEAN
RECORDS**

4

**COMPLETE
ASSESSMENT**



MARKET

**MARKET
SIZE**

16M
HOUSEHOLDS

**MARKET
POTENTIAL**

\$85T
INVESTABLE
ASSETS

×

1%
ADVISOR FEE

=

\$85B
REVENUE

Holistic
Financial
Planning
DESIRES

\$250k-\$1M
AVG. LIQUID
ASSETS

35-55
YEARS OLD



WHY NOW?



EDUCATED CLIENTS

Although “fiduciary ruling” failed to become law; it educated the consumer on advisors conflicts of interest



RIA MARKET

Independent Advisors now are near 30% of the market. 15 years back they accounted only for 10%

COMPETITION

ZOE
FINANCIAL

LISTINGS

LIGHTLY MANAGED

MANAGED

REVENUE MODEL

Advisor Listing Fee

Pay Per Lead

Revenue Sharing

ADVISOR CURATION

NONE

LOW

HIGH

TRUST LEVEL

LOW

LOW

HIGH

CUSTOMER EXP.

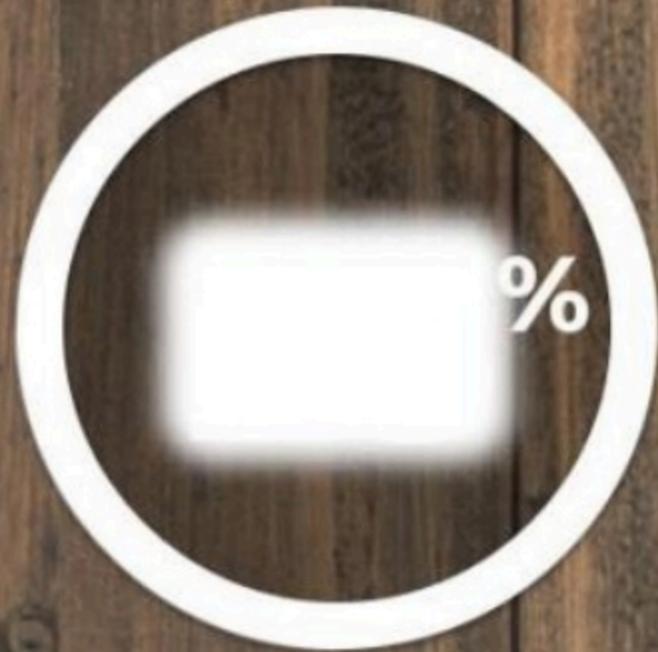
LOW

LOW

HIGH

BUSINESS MODEL

ZOE
CHARGES



ADVISOR'S
RECURRING
REVENUE

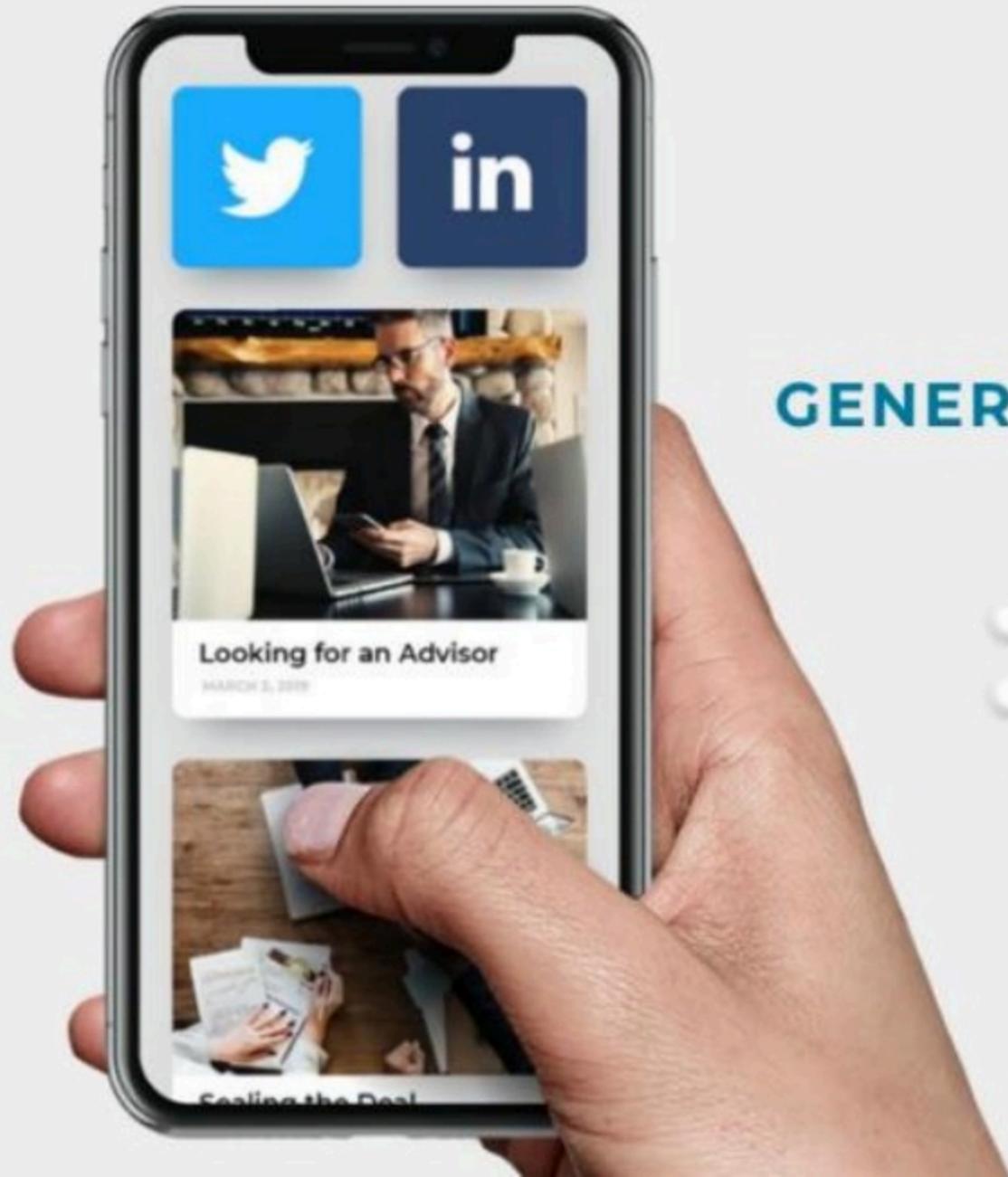


NO NETWORK FEES



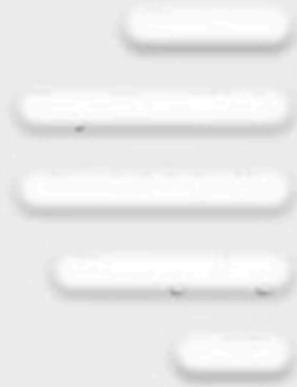
NO FEE PER LEAD

MARKETING



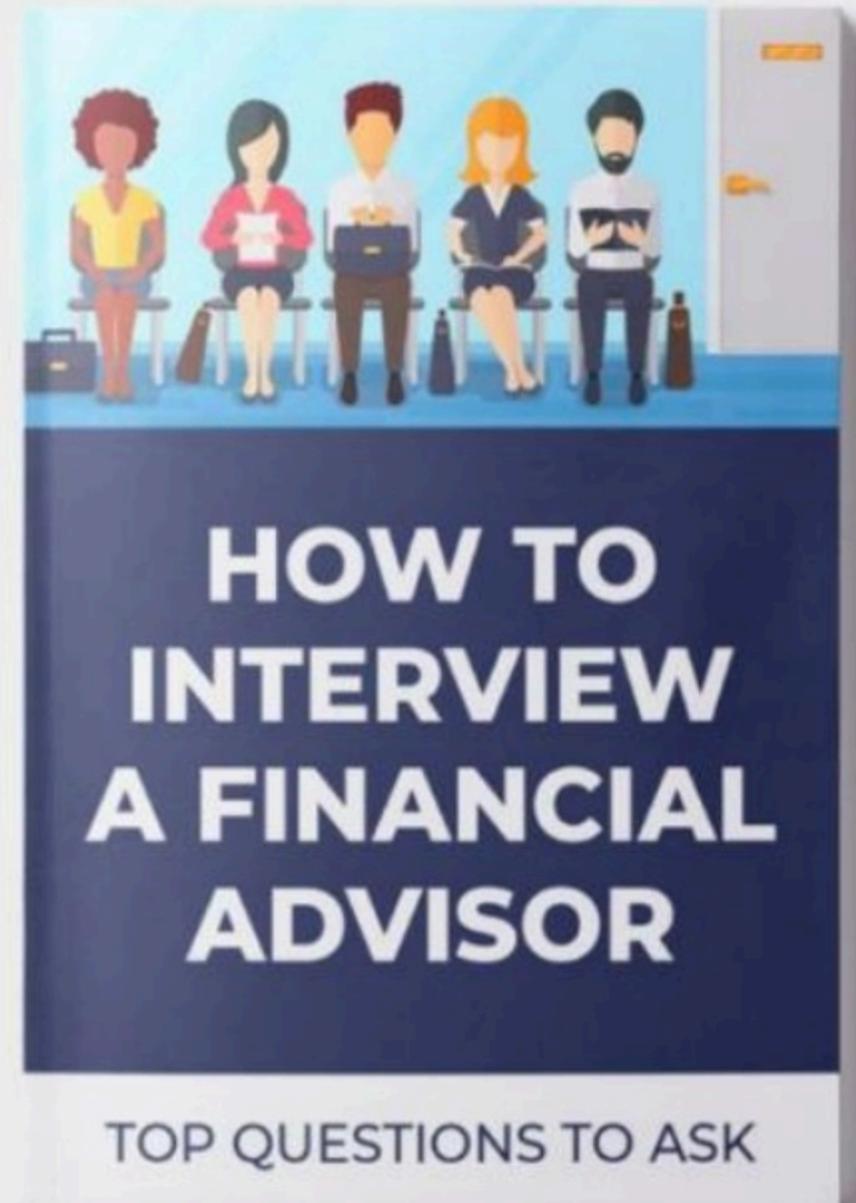
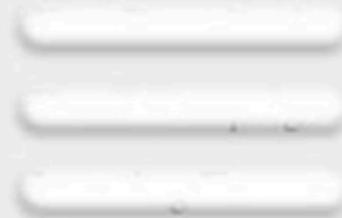
1

**LEAD
GENERATION**



2

**ENGAGE &
EDUCATE**



TEAM



TEAM MEMBER 1



TEAM MEMBER 2



TEAM MEMBER 3



TEAM MEMBER 4



TEAM MEMBER 5



TEAM MEMBER 6

INVESTORS



INVESTOR



INVESTOR



INVESTOR



INVESTOR

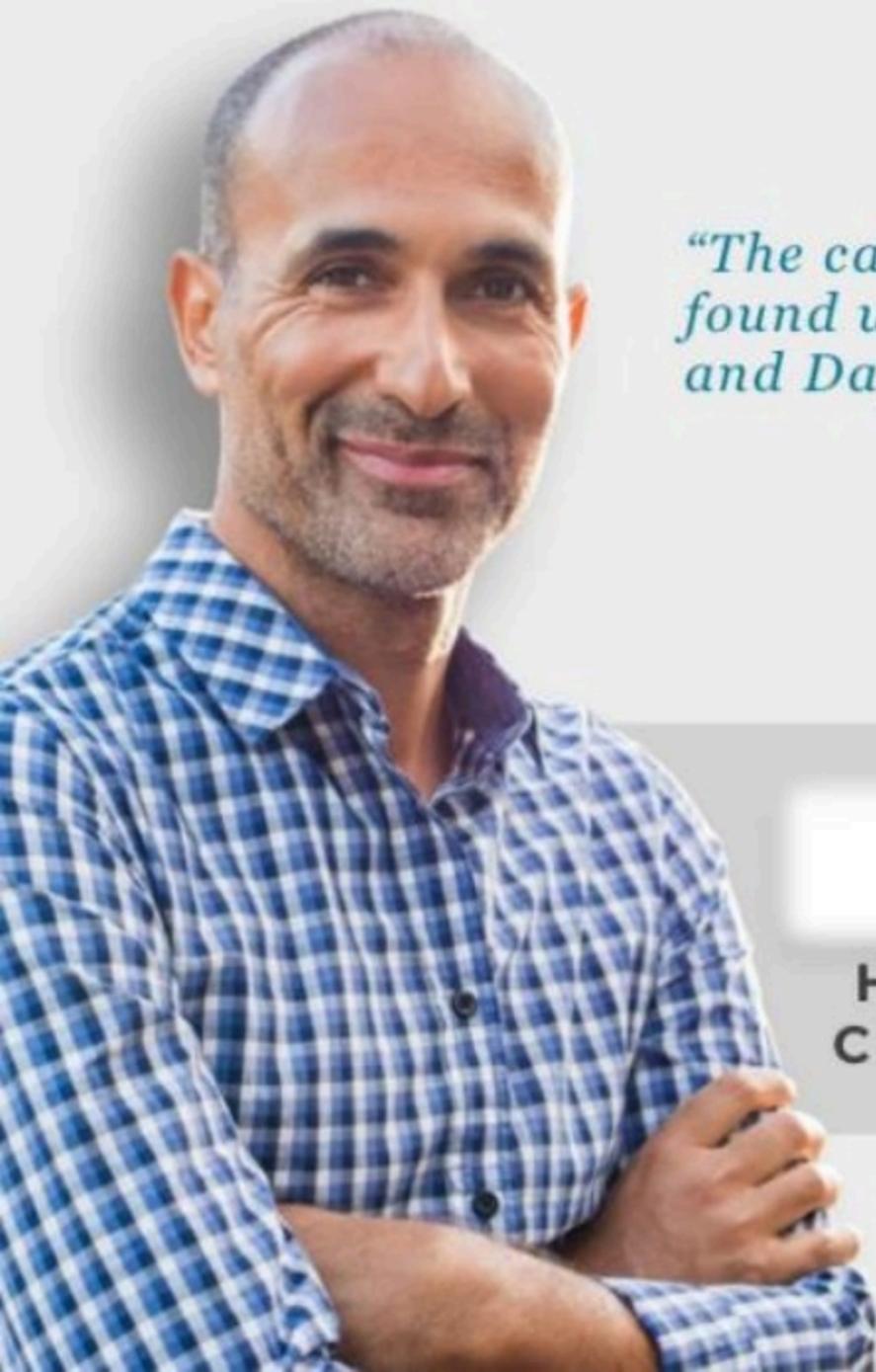


INVESTOR



INVESTOR

MILESTONES



“The caliber of talent Zoe found was obvious. Night and Day.”

“Zoe has become our most strategic partner. They have been a game changer for us.”

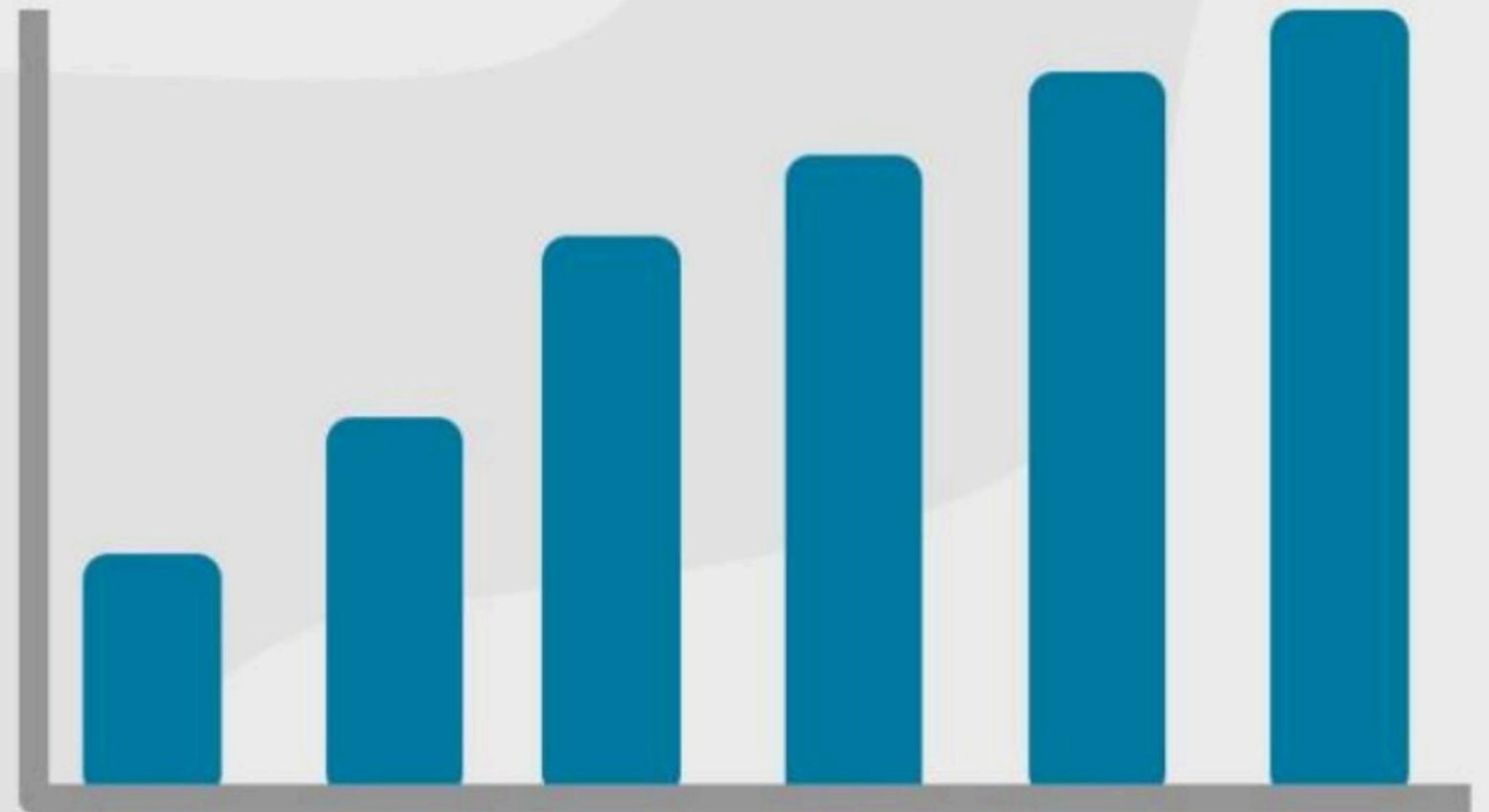


**HAPPY
CLIENTS**

**MANAGED
ASSETS**

**ADVISOR
APPLICATIONS**

ROADMAP





Andres Garcia-Amaya

andres@zoefin.com

SUMMARY

MISSION

Zoe is empowering Americans to make better decisions about their financial life.

CONSUMER BENEFIT

With the click of a mouse, search & hire an advisor that provides advice rather than sell products.

ADVISOR BENEFIT

Outsource marketing and business development efforts at the click of a button so you can focus on servicing clients rather than being a sales person.



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