



Discover more customers and learn more about the ones you already have.

Registered with the SEC as a *Registered Investment Advisor* **CFP** **CPWA** CERTIFIED PRIVATE WEALTH ADVISOR **FINRA**

INTRODUCING POCKETNEST™

Pocketnest introduces a **white-label digital platform** providing **comprehensive, personal financial planning**. Our mission is to empower and educate people to take ownership of their finances through better relationships with you, the financial institution they've counted on for years.

Cue our tag-team approach. We license to financial firms just like you—banks, broker-dealers, registered investment advisors, credit unions, planners, insurance companies, fintech—to help you **understand and serve your nextgen customers**. Through your app, we guide customers through all ten themes of personal financial planning and give them easy, palatable recommendations and step-by-step guidance customized to each user.

What's in it for you? Complete and uber-efficient customer data, giving you a clearer picture of your customers' financial situation, which of your financial products are right for them, and when. That means **more qualified leads, bigger client capacity, higher revenue, and better customer experience**.

The industry is ripe for disruption.

We're the partners who can help you fill this giant white space.

We promote the app to your customers for you!

		Fintech 	Advisor Tech 	Broker Dealers 	Investment Advisors
ENTERPRISE SOLUTION	✓	✓	✓		
CONSUMER FACING	✓	✓	✓	✓	✓
COMPREHENSIVE PLANNING	✓				✓
MOBILE FIRST	✓	✓		✓	
DATA FEED TO INSTITUTION	✓		✓		



We deeply understand millennials and Gen X.



We Seemlessly integrate with banks.



We're the **first and only** financial app of its kind.



We make your relationship with your customers stronger.



Let's make personal finance better, together.
Bring our platform to your customers pocketnest.com

jessica@pocketnest.com



MEET OUR LEADERSHIP TEAM

Ask us about our CRA paper!



Jessica Willis, Founder & CEO hails from a 20-year career in the investment and finance industries. She is a Certified Financial Planner (CFP®) and a Certified Private Wealth Advisor (CPWA®) who has co-managed portfolios ranging from \$50K to \$250MM+. Jessica lives to serve anyone seeking financial advice. She has an MBA from Loyola University Chicago, Quinlan School of Business and a BS from the University of Michigan.



Ashleigh Craven, CMO brings 10+ years' experience in PR/marketing at large and boutique agencies, leading clients to richer customer experiences and brand value. She has a diverse category experience ranging from apparel to automotive to education to finance. Her tenure includes developing and executing communication strategies and supporting national product launches and events for the likes of Soffe, Chevrolet, Wake Forest University, Kaplan Early Learning and more. Oh, and she's our target: a millennial whose parents filled out her first 401(k) form. She has an MA from Wake Forest University and a BA from the University of Michigan.



Chris Wascha, CTO brings 20+ years' experience leading technology teams to deliver business value. He's a strong technical leader who knows how to be scrappy and scale quickly. At his previous 9-year stint at Gas Station TV (GSTV), where he served as CTO, Chris helped grow the tech team from 5 people supporting 100 fuel station installations, to a team of 25 supporting 22,000+ fuel station installations. Chris helped lead GSTV through a private equity sale and a joint venture with its main competitor. He's a no B-S kind of guy who gets his hands dirty, cultivates high-performance culture, and seeks mission-driven work. Chris has a Bachelor's degree in Decision Science and Information Systems from the University of Kentucky.

The Pocketnest™ Experience

Net Worth • Budget • Debt • Insurance • Retirement • Investment • Tax Plan • Estate Plan • College Saving • Annual Review

The screenshot displays the Pocketnest user interface. On the left, a sidebar for user 'Amy Anderson' includes a 'Filter by:' section with 'User Traits' expanded. The main area shows a list of 'Pocketnest Users' including Thomas Cianfrani, Joanna Kerns, Tom & Karen Parker, Rosanne Sundquist, Theo Sweeney, Zoe Sweeney, and Trevor Trent. On the right, a detailed view for Thomas Cianfrani shows financial metrics: Total Net Worth of \$725,000, Cash Flow of +\$278,492, Total Debt of \$262,000, DTI Ratio of 63%, Credit Score of 'Coming Soon', and Total Investable Assets of \$245,000. A navigation menu on the bottom right lists Overview, Financial Snapshot, Cash Flow, Investment Profile, and Debt.

Pocketnest is registered with and regulated by the Securities and Exchange Commission under the Internet Adviser exemption. We are noticed filed in Michigan and can assist residents in other states where we are exempt from notice filing. It is important to understand that nothing in this paper should be considered personalized investment, financial, tax or legal advice.



Let's make personal finance better, together.
Bring our platform to your customers pocketnest.com

jessica@pocketnest.com

