

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

Registered with the SEC as a *Registered Investment Advisor*



CERTIFIED PRIVATE WEALTH ADVISOR



## INTRODUCING POCKETNEST™

Pocketnest introduces comprehensive, personal financial planning in a digital platform to make financial wellness accessible to all. Our mission is to empower and educate customers to take ownership of their finances through better relationships with their financial institutions.

**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. We guide users through all ten themes of personal finance and give them easy, palatable recommendations and step-by-step guidance customized to each user. **What's in it for you?** Priceless and uber-efficient customer data, giving you a clearer picture of your clients' financial portfolio, which products/services they need, and ultimately, how best to serve them. That means more direct leads, higher client capacity and better customer experience.

**The industry is ripe for disruption.**  
We're the partners who can help you fill this giant white space.

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



We deeply understand millenials 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](http://pocketnest.com)

[jessica@pocketnest.com](mailto: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<sup>®</sup>) and a Certified Private Wealth Advisor (CPWA<sup>®</sup>) who has co-managed portfolios ranging from \$50K to \$250MM+. Jessica lives to serve. Previously, Jessica spent the majority of her career at Plante Moran Financial Advisors, with time at MacGregor Associates Chicago and boutique Pointe Capital Management. She has an MBA from Loyola University Chicago, Quinlan School of Business and a BS from the University of Michigan.



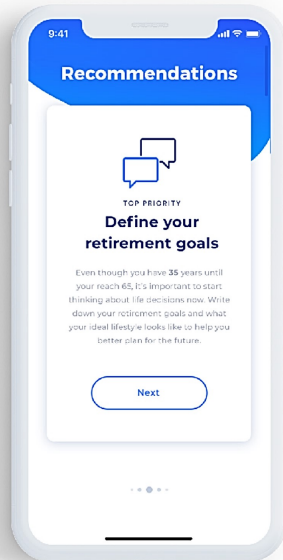
**Ashleigh Craven, CMO** brings 10+ years' experience in PR and marketing at large and boutique agencies and brands, and a diverse category experience ranging from apparel to automotive to education to finance. Her tenure in strategic marketing includes developing and executing communication strategies across the gambit, from branding to media relations. She's supported national product launches and events for the likes of Soffe, Chevrolet, Wake Forest University, Kaplan Early Learning and others. 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.



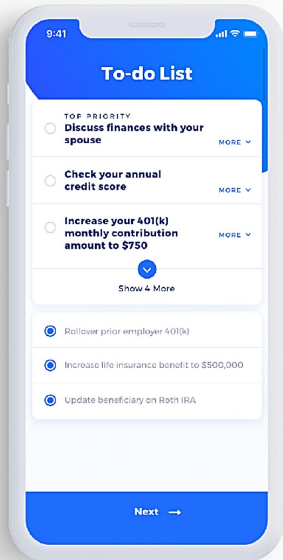
**Ian Sefferman, Technical Advisor** is a master of all things tech. He is responsible for overseeing the technical development of Pocketnest and all its glory. He has experience and expertise from earlier success as founder of MobileDevHQ, a TechStars Seattle company acquired by TUNE. Ian assists us on a part-time contract basis, and when he's not head-down, hammering away on Pocketnest, he is the co-founder at Assembler Labs, Detroit startup studio.

## The Pocketnest™ Experience

Net Worth    Budget    Debt    Insurance    Retirement    Investment    Income Tax Planning Estate  
Planning    College Saving    Annual Review



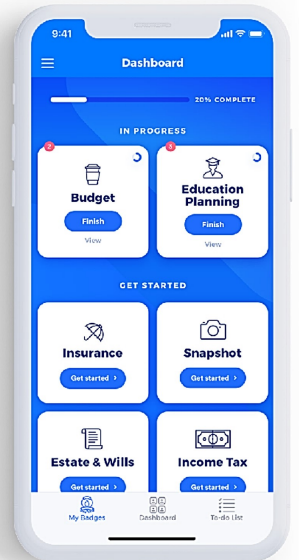
User is prompted through assessment them by theme.



User receives customized, easy to-dos which live on the To-Do List Screen.



After a theme is completed, user receives a sharable digital badge.



View completion score, earned badges, & navigate through themes on Dashboard.



Let's make personal finance better, together.

Bring our platform to your customers [pocketnest.com](https://pocketnest.com)

[jessica@pocketnest.com](mailto:jessica@pocketnest.com)



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