



Agenda

Introductions

Conquest Overview

Demonstration

Q&A + Next Steps

Our momentum

350

Firms served



1/2

of Canadian advisors
access Conquest



3

Countries using our
platform



650,000+

Plans created
using Conquest



100+

Years of experience in
the financial planning
software space



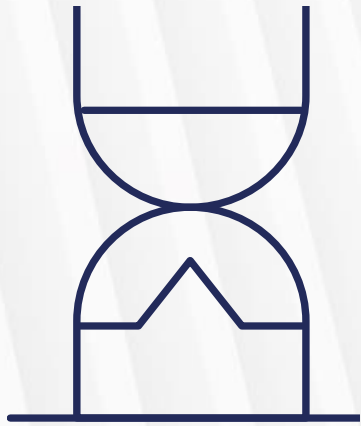
\$35M

In funding
raised



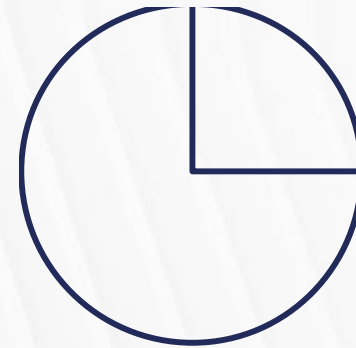
Partners in Market





**1-10
Hours**

average time an advisor spends
constructing a financial plan



75%

of Canadians do not have
a financial plan

Strategic Advice Manager (SAM)










SAM acts as an Intelligent Assistant

- SAM analyses plan data, leverages best practices around financial strategies, business intelligence & client sentiment and presents ranked, prioritised strategies
- Planning Preferences power SAM with additional “profile” information on the client’s objectives, priorities, and risk tolerances
- Illustrates Immediate Impact on Goals through applying recommended strategies to a client’s plan (save more, retire later, optimise withdrawals, etc.)
- Reduce Trial & Error by understanding the compounding & contextual effect of multiple strategies

Patent Pending – USSN 62/812,363

Client Success –Large National Firm

| | |
|--|---|
| 50% More Plans Created  | 87% Increase in AUM  |
| 97% Increase in Wealth Sales  | 21% Increase in advisor compensation  |
| 31% Increase in annual insurance premiums  | 12% Higher sales  |
| 19% Higher cross-sell rate  | Annual net cash flow is \$378k Higher for “planners” vs. “others” |

DEMO