

smartpurse

Unlocking Financial Freedom
The Pioneering Platform Transforming
How People Learn, Plan, and Grow Wealth



Venture Leaders Fintech Roadshow, December 2024

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The problem - meet Chloé



No-one teaches you about the practical things of money

7 out of 10 women leave their wealth planning to their partner

51% of young people cannot answer three basic financial questions

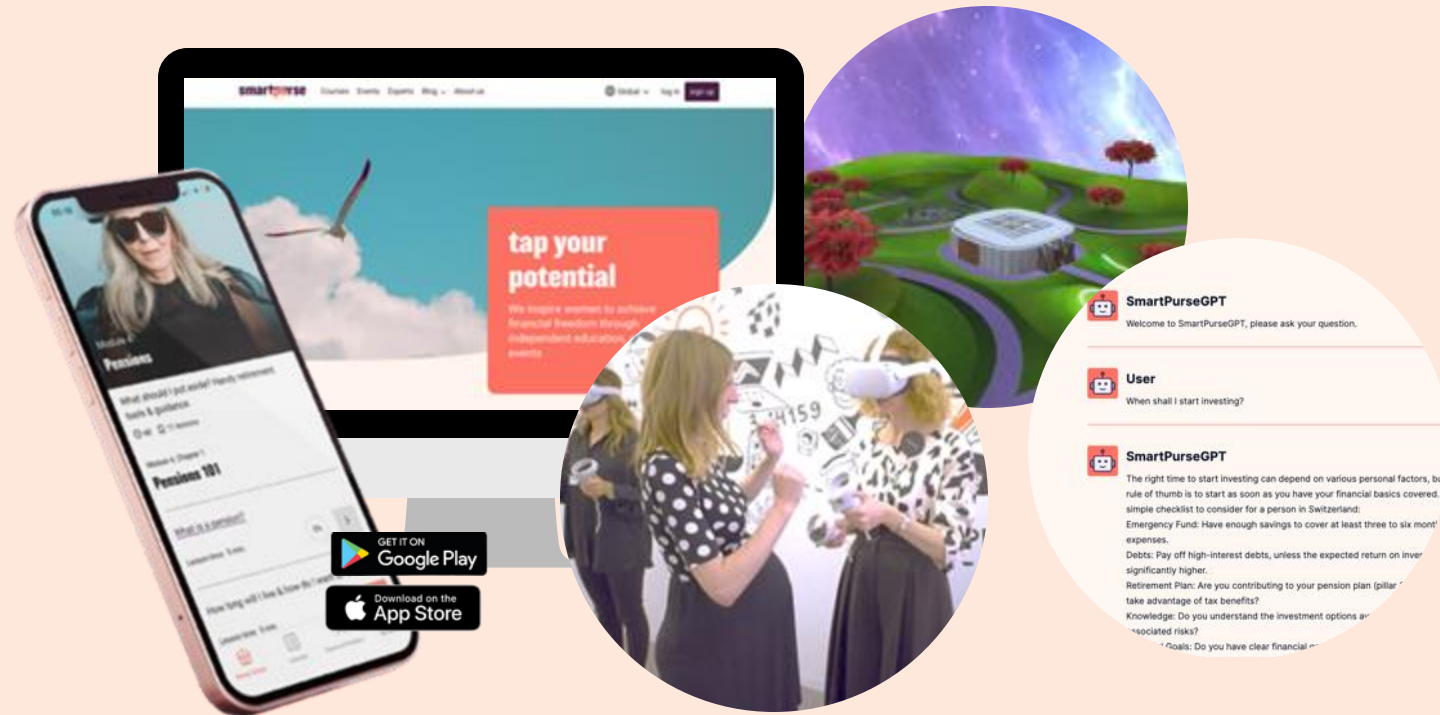


Employee financial stress

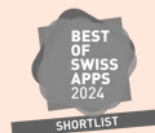
is costing employers over £10 billion a year



Pioneering platform for inclusive financial planning and education transforming how people learn, plan and grow wealth



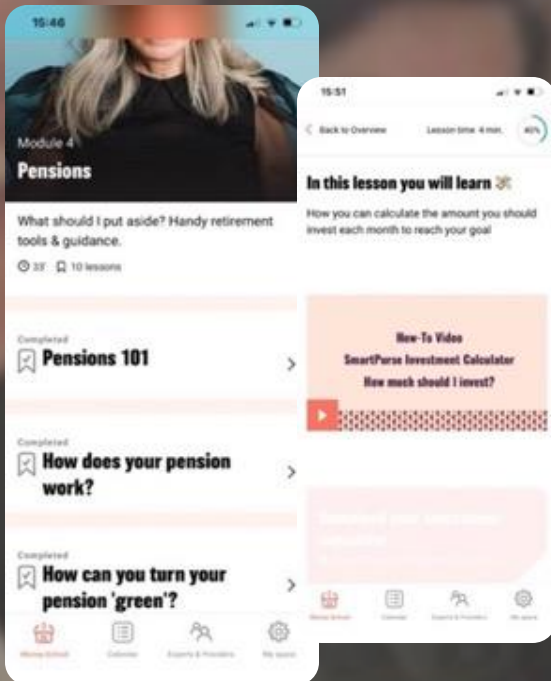
Award-winning Financial Education and Planning Ecosystem in Web, App, Metaverse powered by AI



We make Finances Exciting, Joyful, and Accessible to All

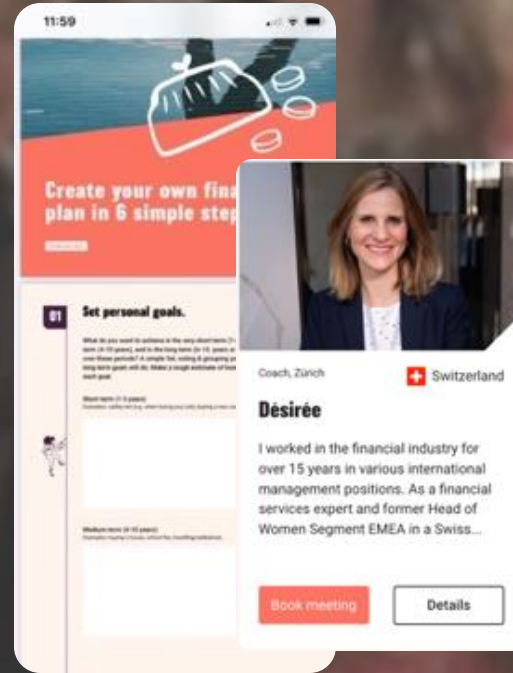
1

Learn



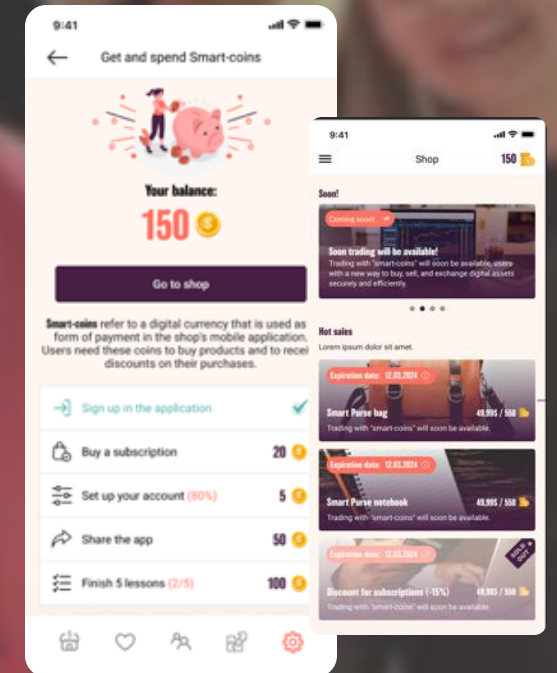
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Plan



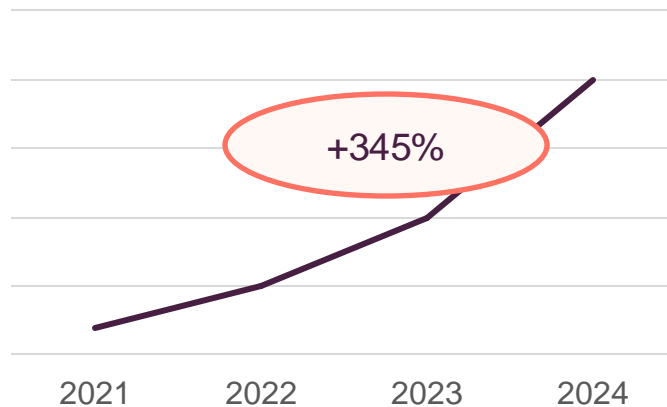
3

Earn



Traction - Accelerating growth with B2B2C

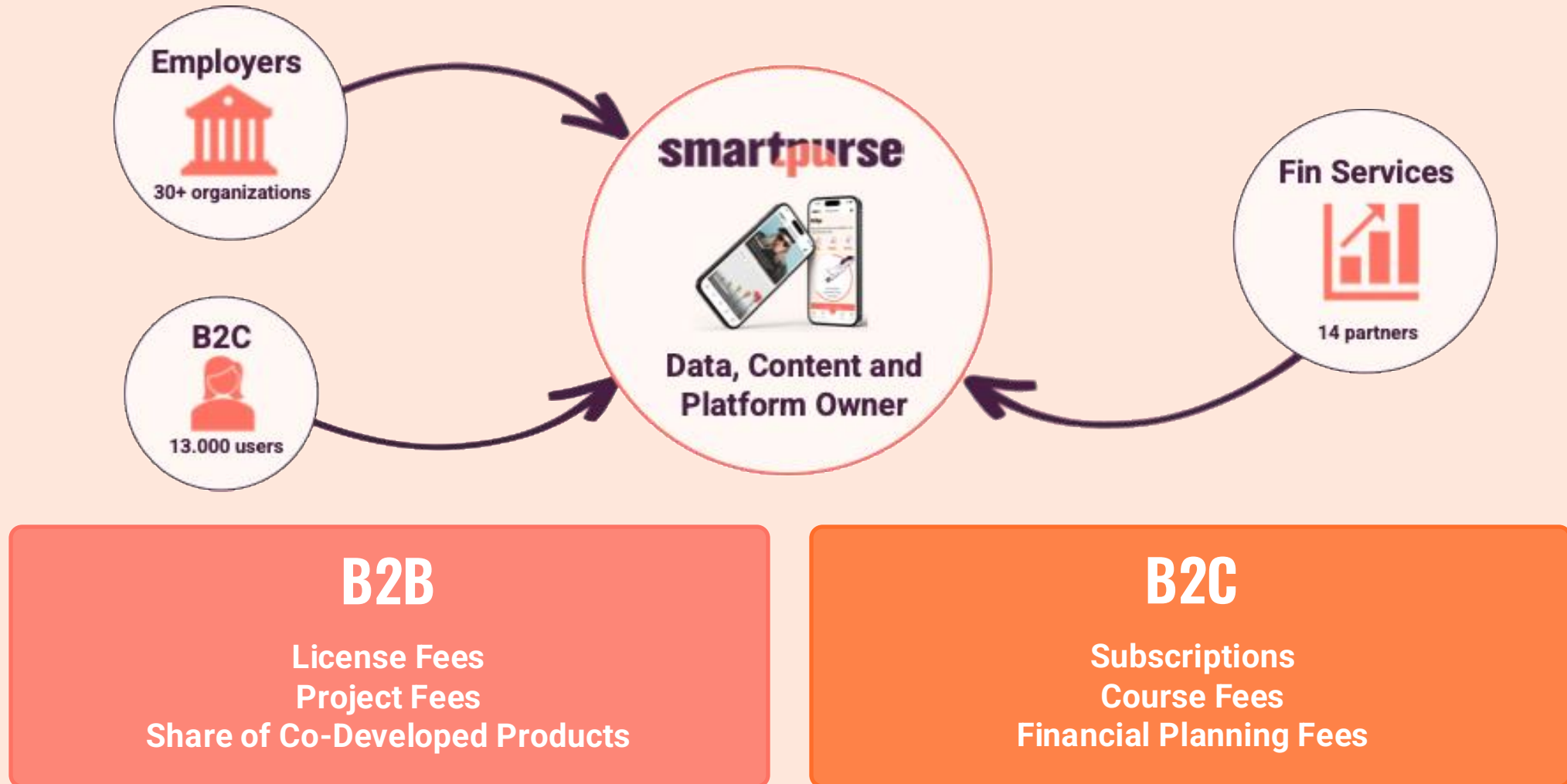
B2B Partner Growth



- 15 paying live contracts
- 1.5m CHF in proposals with high likelihood of success
- Expanding to Austria now in Nov, expanding to Dubai in Feb 25

ERSTE  Swissquote  +alpian SIEMENS 

Financial Education as a Service B2B2C Business Model



The Market - A timely and substantial opportunity



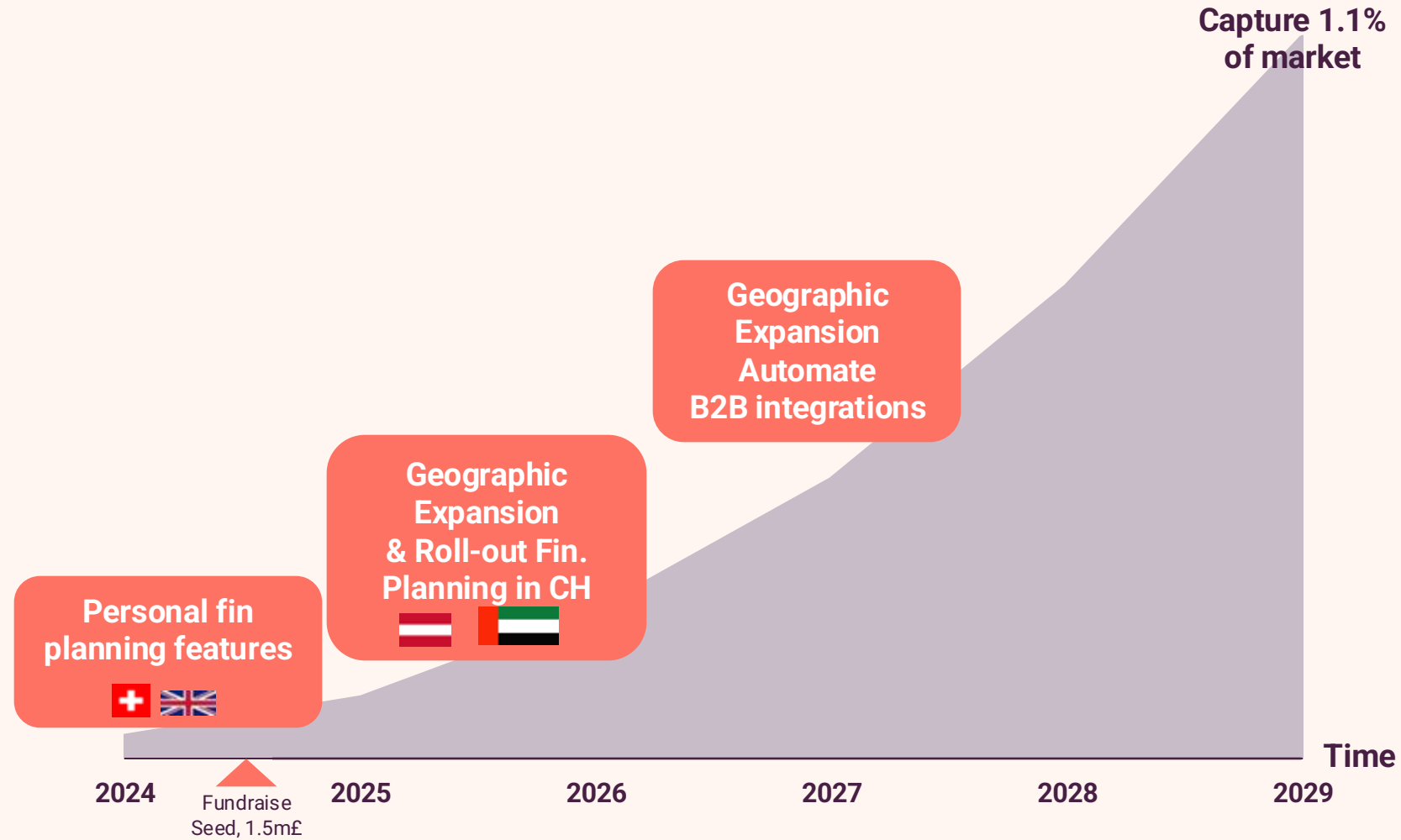
**72% of our
learners start
investing**

**9.400 corporates in CH and UK
= £1.4bn p.a. financial wellness market**

**4.7m people employed in CH, however only
32'000 financial plans p.a. are being provided**

Roadmap

Scale rapidly to Europe's largest Financial Wellness Provider



*Duolingo currently holds 1% of the estimated e-learning market Europe (source: statista)

Team

Highly experienced and uniquely credible founder team, innovative multi-cultural execution team



Olga Miler
Co-Founder, CEO & Product Owner
Award-winning innovator in Financial Services, globally recognized gender-finance expert, Top 100 women in Business in Switzerland



Michael Weiss - COO



Ivo Bieri - Biz. Dev & Partnerships DACH



Amanda Su Brown - Marketin 6 Biz Dev. UK



Beat Christen - Tech Architecture



Jude Kelly
Co-Founder & Creative Director
Voted the most powerful woman in the Arts, Founder of the WoW Foundation



Rayha Ballim - content Marketing Specialist



Dev and design flexible team
Oleg Novosad, Oleh Hrytsyshyn

Investment Opportunity

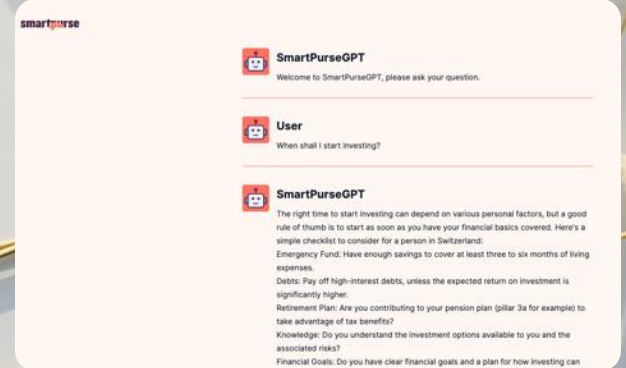
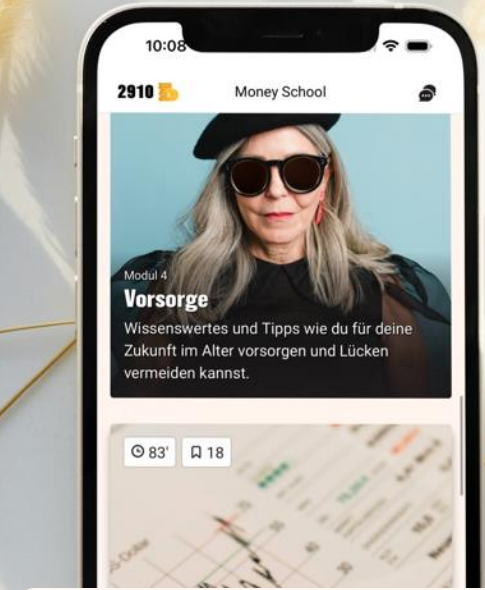
Raising £1.5m/2m CHF by Q3 2025

1. Professionalise financial planning approach
2. Marketing to engage more corporates and foster B2B integration
3. Upgrade data analytics and AI learning assistant

Team
Growth
45%

Marketing
33%

Solution
22%



**Let's revolutionise how people learn,
plan and grow wealth at scale
Thank you!**

**START TODAY WITH
OUR FREE APP**



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