

*Creating an*

# UNFAIR ADVANTAGE



UXWEALTH

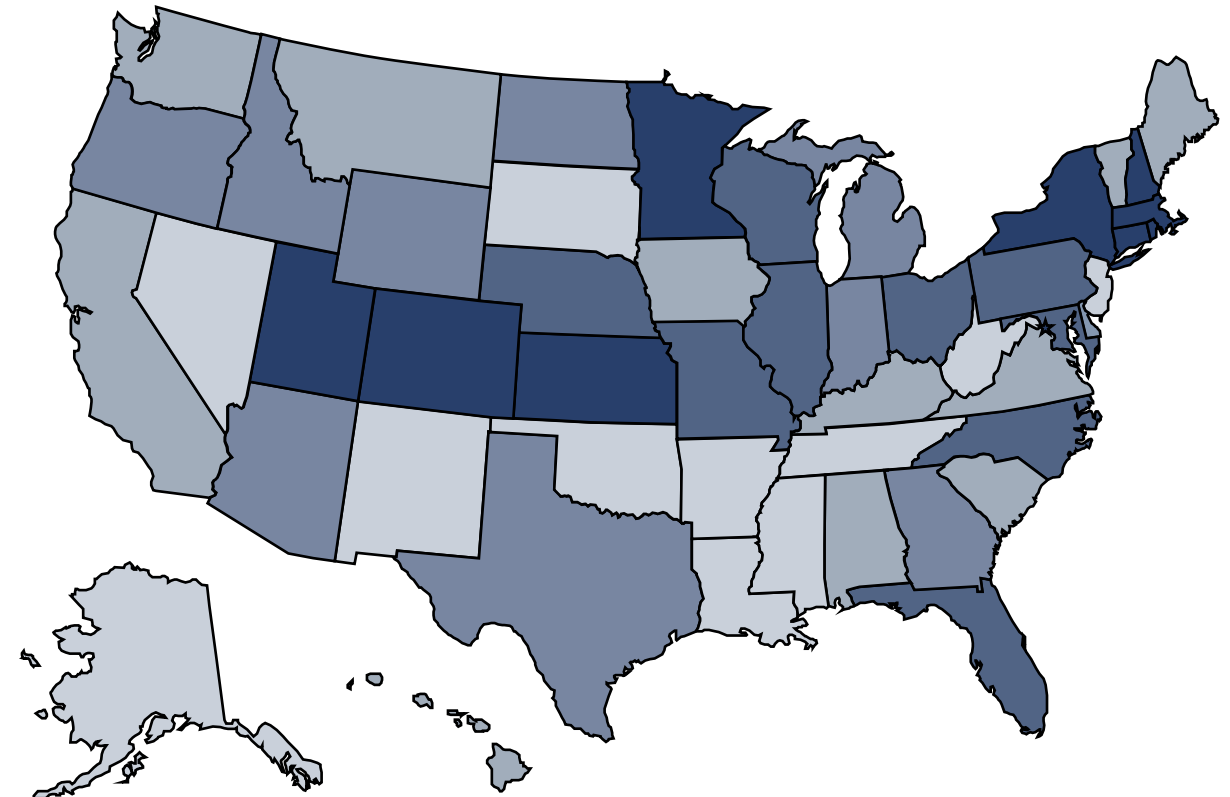
 [uxwp.com](https://uxwp.com)

 [info@uxwp.com](mailto:info@uxwp.com)

# A CROWDED Market

*Financial Advisors Relative to the Adult Population*

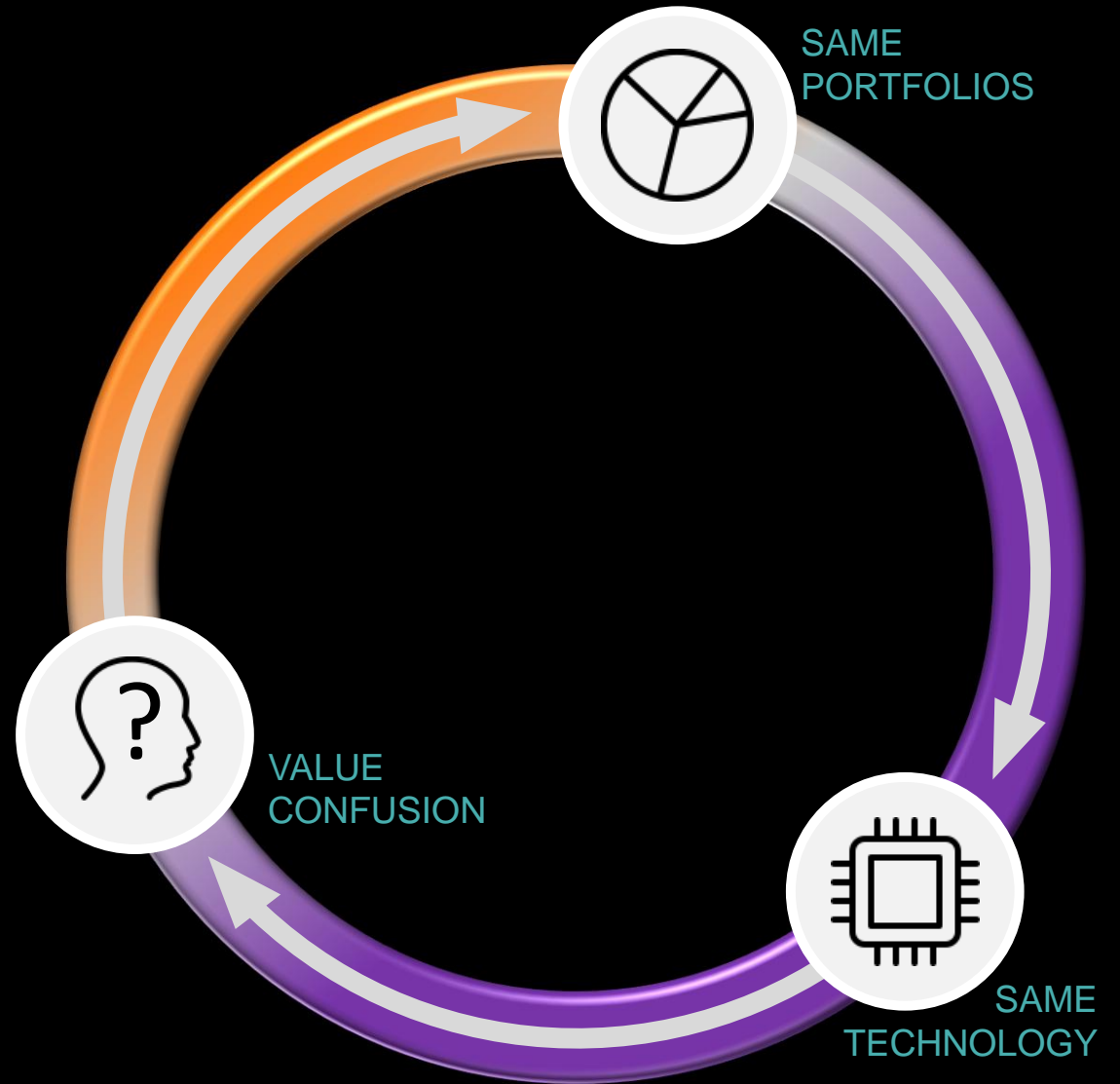
- ▶ **218,100**  
Personal Finance Advisors
- ▶ **100+**  
Robo Advisors
- ▶ **DIRECT**  
Investment Access
- ▶ **99%**  
of people DO NOT use a financial advisor
- ▶ **76%**  
of people invest THEMSELVES



Lowest Concentration  Highest Concentration

# The Cycle of Self-Defeating

**STATUS QUO**  
STATUS QUO  
STATUS QUO



# Investor Desires are **CLEAR**

*Top Reasons for Advisor Selection*



Investment  
Offering

**53%**



Technology  
Offering

**42%**



Personalized  
Experience

**34%**



Better Product  
Recommendations

**32%**

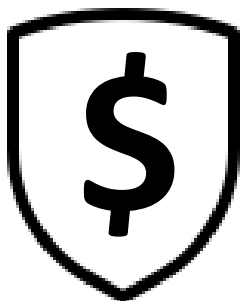


Always - On  
Interaction

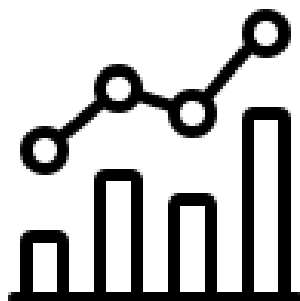
**30%**



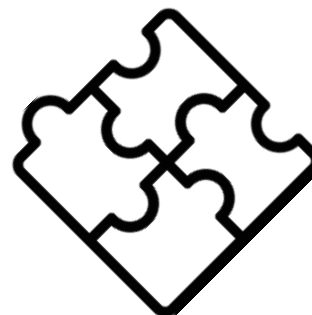
# As are **EXPECTATIONS**



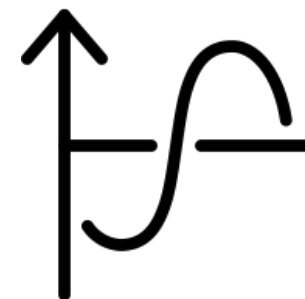
Downside  
Protection Over  
Diversification



Wider Range  
of Investment  
Offerings



“Tailored”  
Products and  
Solutions



“Science-Based  
Advice”

**Deloitte.**

# Outcomes **MATTER**

# #1

Reason Clients Leave a  
Financial Advisor is

**UNDERPERFORMANCE  
OF INVESTMENTS**

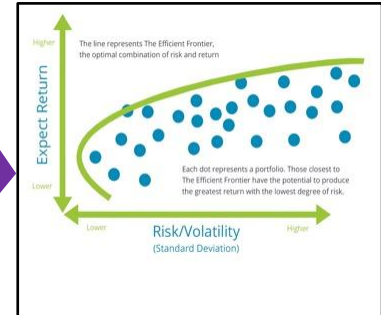
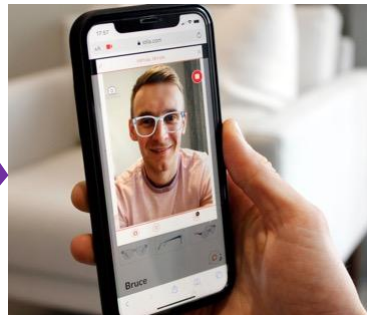
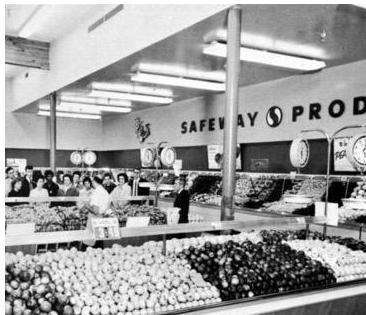
# 97%

Financial Advisors Cited a  
Clients Greatest Concern is

**INVESTMENT  
PERFORMANCE**

# Leverage Technology to **BREAK THE CYCLE**

Our Investments Use *Technology* to Help Us Make Better Investment Decisions



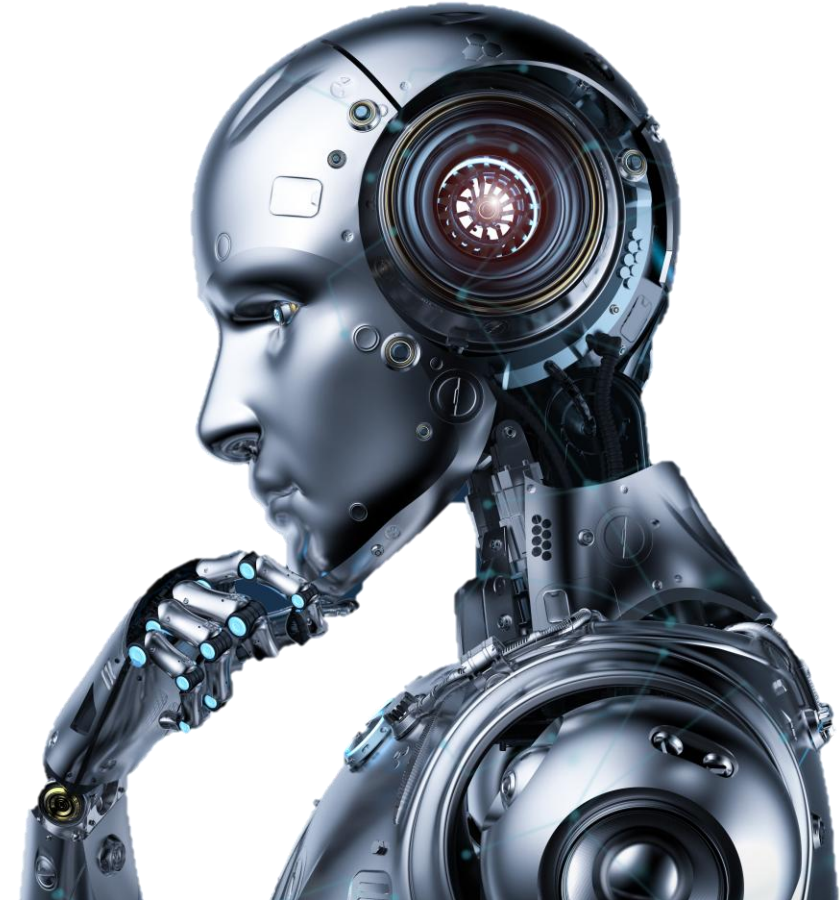
Technology has revolutionized every industry... *except ours*. How we invest hasn't changed since

1952



# Tech is **BEATING WORLD CHAMPIONS**

- ▶ **Billions of Games**  
Learns by playing billions of games against itself
- ▶ **Predicts the Future**  
Identifies patterns that predict the future
- ▶ **Optimal Strategies**  
Discovers optimal strategies
- ▶ **Dynamic Shifts**  
Dynamically shifts between strategies



The Time Has Come to Apply the Same Principles to Investing



# Top 3 Themes Advisors Say They **NEED TO EMBRACE**

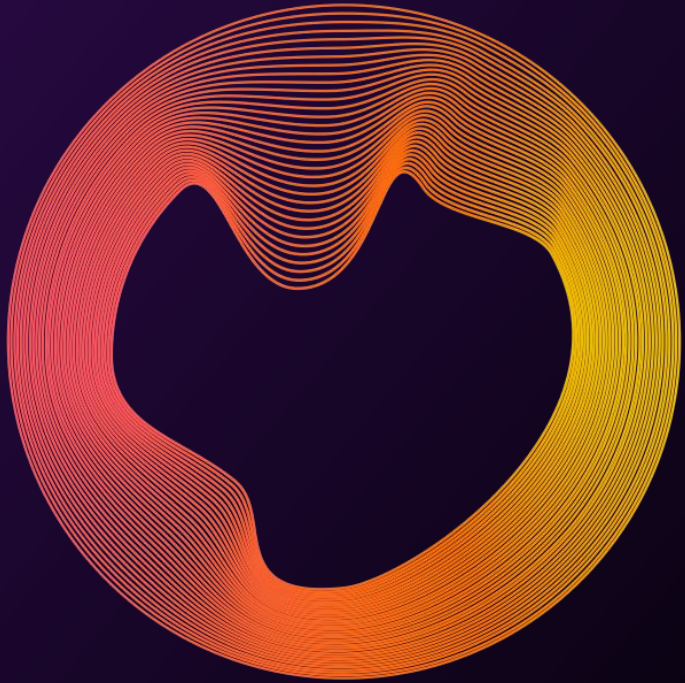
CGI

Voice of the Advisor:  
Survey report

- ▶ **Expand** their value proposition
- ▶ **Enable** technology to fuel efficiency
- ▶ **Embrace** change

# How We **END THE STATUS QUO**

- ▶ Downside Risk Protection
- ▶ Technology-Driven Investment Advice
- ▶ Diversified Menu of Investments
- ▶ Hyper-Personalized Client Experience
- ▶ Exclusive Platform Access



**UXWEALTH**



# Air Traffic Control for **YOUR BUSINESS**





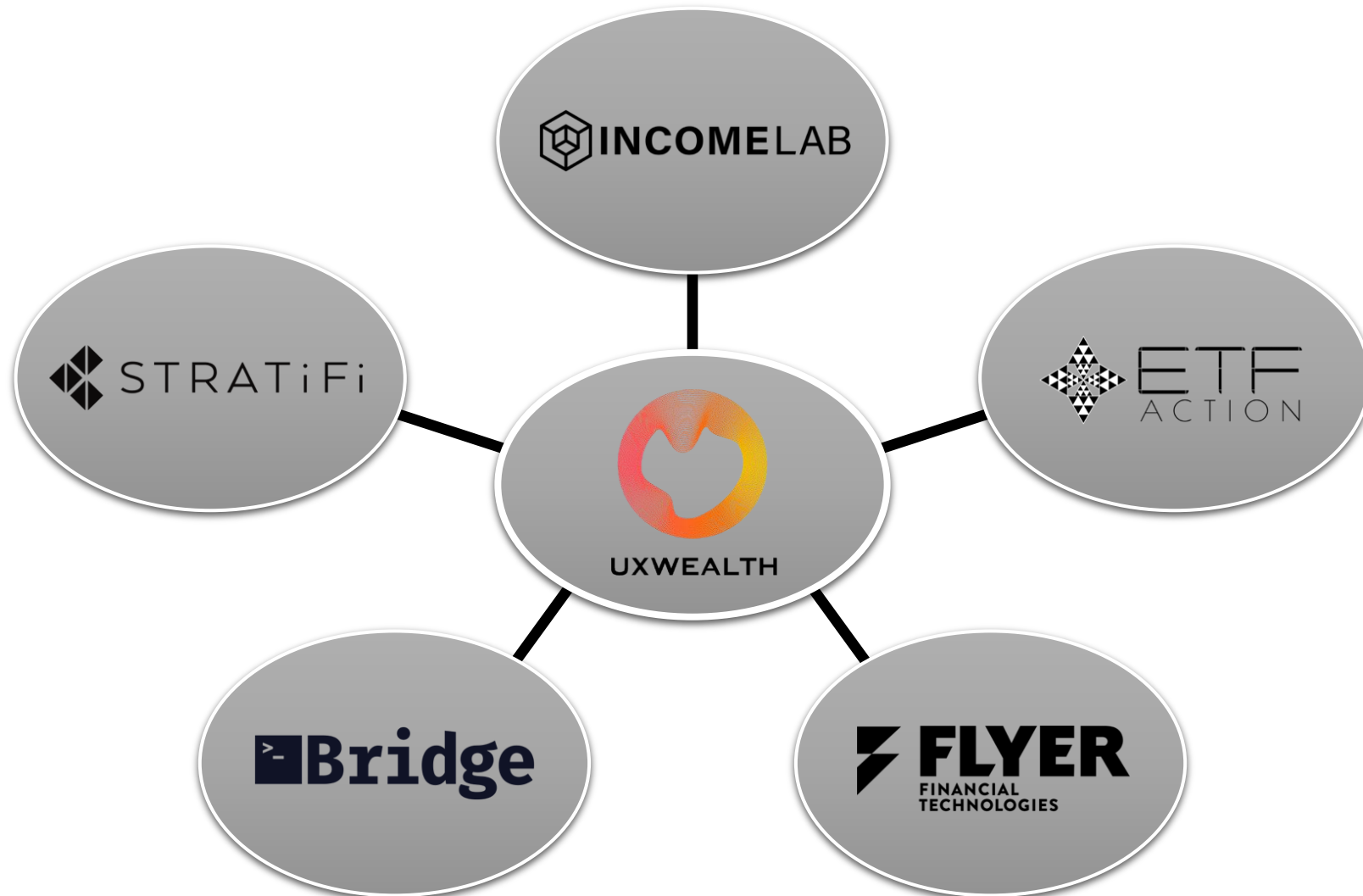
# Eliminating NOISE

The image displays a comprehensive grid of logos for various financial technology providers, organized into functional categories. The categories include:

- PORTFOLIO REPORTING
- CYBERSECURITY
- BEHAVIOR ASSESSMENTS
- MANAGED SERVICE PROVIDERS
- FINANCIAL PLANNING
- APPRISE LABS
- PLANNING LIGHT
- SOCIAL MEDIA ARCHIVING
- PLAN MONITORING
- BUSINESS SYSTEMS SUPPORT
- CLIENT NOTE TAKING
- COMPLIANCE
- CLIENT DATA GATHERING
- ADVICE SUPPORT
- MIND MAPPING
- CLIENT FILE SHARING
- DOCUMENT MANAGEMENT
- ACCOUNT AGGREGATION
- CLIENT PORTAL
- SCHEDULE APPS
- E-SIGNATURE
- REBALANCING ONLY
- FORMS MANAGEMENT
- CRM
- CRM OVERLAYS
- ADVISOR LEAD GEN
- DIGITAL MARKETING
- 401(K) IMPLEMENTATION
- ADVISOR PLATFORM
- ADVISOR
- ADVISOR LEAD PILOT
- STUDENT LOAN
- OTHER
- ADVICEWORKS
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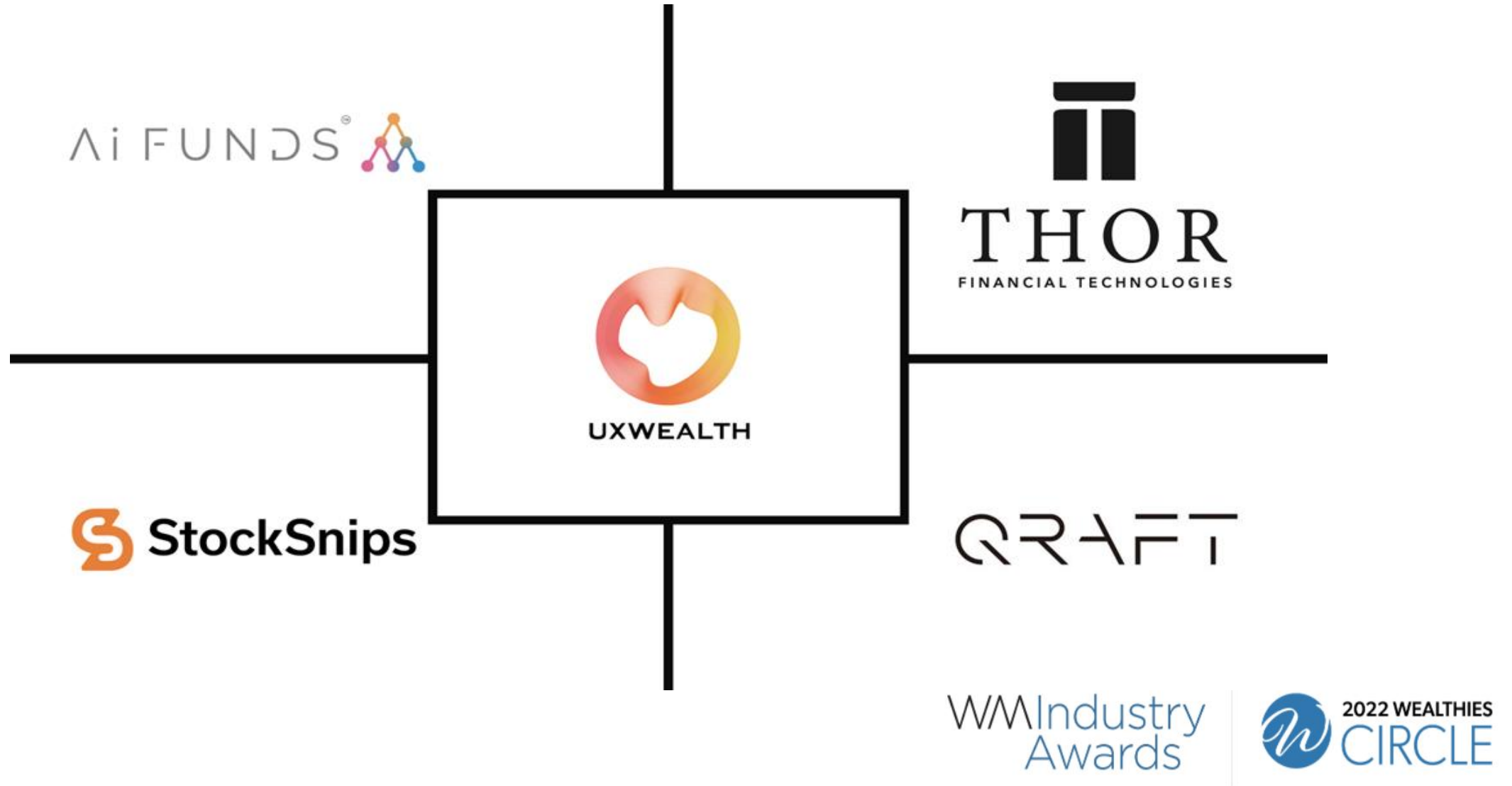
The logos represent a wide array of providers such as FCI, entreda, Money Quotient, Financial DNA, Positively, DataPoints, RA, RetireUp, Wealth2K, SSANALYZER, INCOMEELAD, INCOMECONDUCTOR, timeline, BigPicture, AnnuityCheck, LifeSite, wishlife, everplans, legacyshield, Yourfolio, Vanilla, PLANNER CS, BNA Income Tax, myStockOptions.com, StockOpter, CFS Tax Software, Inc., [TAX] CLARITY, holistiplan, EFC PLUS, PAYOFF, Loanbuddy, CFS, CSLA TECH, Student Loan Eliminator, Capstone COLLEGE PARTNERS, IPS Advisor Pro, healthcare planning, 65 MAX, AVANTE, CFM, GENIVITY, fp alpha, ADVICE SYSTEMS, INC., eMoney, Yodlee, PLAID, Broadridge, Aquamulate, mindmeister, asset+map, FutureVault, box, Dropbox, ShareFile, EGNTE, ComConnect, EGNTE, ComConnect, DocuSpace, Laserfiche, Worldox, netdocuments, oFileCabinet, DocuSign, RightSignature, Adobe Sign, HELLOSIGN, MyPlanMap, knudge HUBLY, RED OAK, RegEd, RIA in a Box, EQUINA, ComplianceMAX, SmartRIA, MyPlanMap, benjamin ForwardLane, PreciseFP, LifeArcPlan, ANVIL, Copytalk, PULLSE360, TOWERPOINT, JUNXURE, Ebix, Wealthbox, ADVIZION, XLR8, ss&c, Practifi, WEALTHCONNECT, Skience, FEE-ONLY, WISERADVISOR, Piny, MyaiPerfect, HARNESS WEALTH, wealthunder, ZOE, smartasset, indyfin.

# Using SUPERIOR TECHNOLOGY





# Exclusive INVESTMENT PARTNERS





## Top 10 Model Performance as of March 17, 2023

Rank	Model	Provider	1mo	3mo	YTD	1yr	3yr Ann.	Risk As Of	Std Dev	Sharpe Ratio	Beta
1	Thor Dollar ALT	Thor Financial Technologies	4.27%	2.78%	0.60%	-6.36%	22.60%	2023-02-28	8.12%	1.05	0.15
2	Thor Diversified Bond	Thor Financial Technologies	1.30%	0.35%	2.48%	-3.51%	0.49%	2023-02-28	9.40%	1.06	0.24
3	Qraft Enhanced All Weather	Qraft Technologies	1.13%	3.31%	5.40%	-10.34%	7.69%	2023-02-28	11.21%	1.29	0.28
4	Ai Unconstrained 30	Ai Funds	1.96%	1.83%	1.83%	-5.29%	-1.91%	2023-02-28	12.42%	1.52	0.29
5	Ai Core 40	Ai Funds	0.00%	1.31%	1.36%	-0.08%	9.20%	2023-02-28	13.73%	1.59	0.34
6	Ai Unconstrained 25	Ai Funds	-0.10%	0.87%	0.74%	-1.95%	0.93%	2023-02-28	12.55%	1.41	0.32
7	Thor US 30	Thor Financial Technologies	-0.15%	-0.15%	1.03%	-5.25%	0.85%				
8	Thor Global 30	Thor Financial Technologies	-0.19%	0.13%	1.41%	-4.09%	1.78%	2023-02-28	16.95%	1.39	0.47
9	Ai Unconstrained 40	Ai Funds	-0.37%	3.20%	3.07%	-3.27%	0.26%	2023-02-28	13.49%	1.05	0.49
10	Thor Sector 30	Thor Financial Technologies	-0.40%	0.15%	1.15%	-4.21%	4.05%	2023-02-28	27.72%	0.74	0.42
	S&P 500 ETF	SPY	-3.87%	2.15%	2.37%	-9.80%	17.59%	2023-02-28	20.80%	0.55	1.00
Rank	Model	Provider	1mo	3mo	YTD	1yr	3yr Ann.	Risk As Of	Std Dev	Sharpe Ratio	Beta
1	Thor NextGen Stock	Thor Financial Technologies	-1.59%	27.37%	36.59%	-30.95%	22.65%	2023-02-28	8.12%	1.05	0.15
2	Ai Tact	Ai Funds	-4.27%	16.74%	16.61%	6.77%	18.88%	2023-02-28	9.40%	1.06	0.24
3	Ai Unconstrained 100+	Ai Funds	-3.97%	16.39%	16.25%	5.70%	23.18%	2023-02-28	11.21%	1.29	0.28
4	Ai QQAI	Ai Funds	-3.51%	9.77%	9.83%	6.81%	26.07%	2023-02-28	12.42%	1.52	0.29
5	Thor NextGen ETF	Thor Financial Technologies	-8.48%	7.97%	11.86%	-28.83%	12.35%	2023-02-28	13.73%	1.59	0.34
6	Qraft Enhanced All Weather	Qraft Technologies	1.13%	3.31%	5.40%	-10.34%	7.69%	2023-02-28	12.55%	1.41	0.32
7	Ai Unconstrained 40	Ai Funds	-0.37%	3.20%	3.07%	-3.27%	0.26%				
8	Thor Icon	Thor Financial Technologies	-5.46%	2.98%	2.71%	-20.84%	1.49%	2023-02-28	16.95%	1.39	0.47
9	Thor Dollar ALT	Thor Financial Technologies	4.27%	2.78%	0.60%	-6.36%	22.60%	2023-02-28	13.49%	1.05	0.49
10	Ai Prop	Ai Funds	-5.06%	2.41%	2.29%	-15.67%		2023-02-28	27.72%	0.74	0.42
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6	Qraft Enhanced All Weather	Qraft Technologies	1.13%	3.31%	5.40%	-10.34%	7.69%	2023-02-28	12.55%	1.41	0.32
7	Qraft Enhanced Golden Butterfly	Qraft Technologies	-1.22%	2.26%	3.98%	-9.31%	7.05%				
8	Ai Unconstrained 40	Ai Funds	-0.37%	3.20%	3.07%	-3.27%	0.26%	2023-02-28	16.95%	1.39	0.47
9	Thor Icon	Thor Financial Technologies	-5.46%	2.98%	2.71%	-20.84%	1.49%	2023-02-28	13.49%	1.05	0.49
10	Thor Diversified Bond	Thor Financial Technologies	1.30%	0.35%	2.48%	-3.51%	0.49%	2023-02-28	27.72%	0.74	0.42
	S&P 500 ETF	SPY	-3.87%	2.15%	2.37%	-9.80%	17.59%	2023-02-28	20.80%	0.55	1.00
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2	Ai Tact	Ai Funds	-4.27%	16.74%	16.61%	6.77%	18.88%	2023-02-28	9.40%	1.06	0.24
3	Ai Unconstrained 100+	Ai Funds	-3.97%	16.39%	16.25%	5.70%	23.18%	2023-02-28	11.21%	1.29	0.28
4	Ai Core 40	Ai Funds	0.00%	1.31%	1.36%	-0.08%	9.20%	2023-02-28	12.42%	1.52	0.29
5	Ai Core 70	Ai Funds	-4.65%	2.25%	2.30%	-0.53%	19.49%	2023-02-28	13.73%	1.59	0.34
6	Ai Core 80	Ai Funds	-6.35%	1.64%	1.69%	-0.94%	22.47%	2023-02-28	12.55%	1.41	0.32
7	Ai Core 50	Ai Funds	-1.30%	2.29%	2.34%	-1.39%	10.53%				
8	Ai Unconstrained 100	Ai Funds	-4.76%	0.94%	0.82%	-1.91%	12.54%	2023-02-28	16.95%	1.39	0.47
9	Ai Unconstrained 25	Ai Funds	-0.10%	0.87%	0.74%	-1.95%	0.93%	2023-02-28	13.49%	1.05	0.49
10	Nationwide Monument IOVA 30	Nationwide/Thor Financial Technologies	-0.54%	0.30%	0.37%	-2.35%	6.15%	2023-02-28	27.72%	0.74	0.42
	S&P 500 ETF	SPY	-3.87%	2.15%	2.37%	-9.80%	17.59%	2023-02-28	20.80%	0.55	1.00
Rank	Model	Provider	1mo	3mo	YTD	1yr	3yr Ann.	Risk As Of	Std Dev	Sharpe Ratio	Beta
1	StockSnips Weekly All Cap	StockSnips	-6.71%	-5.55%	-4.19%	-3.79%	29.73%	2023-02-28	8.12%	1.05	0.15
2	Ai QQAI	Ai Funds	-3.51%	9.77%	9.83%	6.81%	26.07%	2023-02-28	9.40%	1.06	0.24
3	StockSnips Monthly Multi-Factor All Cap	StockSnips	-6.33%	1.63%	1.63%	-3.84%	23.63%	2023-02-28	11.21%	1.29	0.28
4	Ai Unconstrained 100+	Ai Funds	-3.97%	16.39%	16.25%	5.70%	23.18%	2023-02-28	12.42%	1.52	0.29
5	Thor NextGen Stock	Thor Financial Technologies	-1.59%	27.37%	36.59%	-30.95%	22.65%	2023-02-28	13.73%	1.59	0.34
6	Thor Dollar ALT	Thor Financial Technologies	4.27%	2.78%	0.60%	-6.36%	22.60%	2023-02-28	12.55%	1.41	0.32
7	Ai Core 80	Ai Funds	-6.35%	1.64%	1.69%	-0.94%	22.47%				
8	StockSnips Weekly US Sector Sentiment	StockSnips	-8.41%	-5.31%	-5.80%	-16.74%	21.71%	2023-02-28	16.95%	1.39	0.47
9	Ai Core 70	Ai Funds	-4.65%	2.25%	2.30%	-0.53%	19.49%	2023-02-28	13.49%	1.05	0.49
10	Ai Tact	Ai Funds	-4.27%	16.74%	16.61%	6.77%	18.88%	2023-02-28	27.72%	0.74	0.42
	S&P 500 ETF	SPY	-3.87%	2.15%	2.37%	-9.80%	17.59%	2023-02-28	20.80%	0.55	1.00

\*Performance is net of management fees of 0.55%.

\*\*All data updated as of previous day's close except (1) Equity fundamental data aggregated by ETF Action using FactSet individual security data is updated weekly, (2) Fixed income fundamental data provided directly by FactSet and updated monthly and (3) Risk Metrics are calculated as of previous month end.

# Against the most **RECOGNIZED**

3 Year Model Comparison through 2 – 28 – 2023

Portfolio	Sharpe Ratio	Annualized Return	Std. Dev.	Beta
Ai QQAI	1.39	26.29%	16.95%	0.47
Thor Sector 100	1.00	15.03%	14.10%	0.52
StockSnips Ai Sentiment	0.73	20.39%	25.79%	1.12
Ai Core 80	1.59	24.16%	13.73%	.34
Qraft Enhanced Factor Rotation	0.52	9.60%	17.80%	0.84
American Funds Growth Fund of America	0.35	7.64%	20.90%	1.00
Vanguard CRSP 100/0	0.33	6.04%	17.78%	0.94

# The **BEST** UX in the Industry

*Technology has come a long way – shouldn't your investment platform?*

- ▶ **Award Winning Model Marketplace**
- ▶ **Outsourced Trading, Billing, and Reporting to Automate and Scale your Business**
- ▶ **Advisor and Client Dashboard Branded to your RIA**
- ▶ **No Re-Papering = EASY Setup**
- ▶ **Proposal Generation and Fact Sheets**
- ▶ **Market Exclusivity and Unique Competitive Advantage**



# Stay Ahead of the **CURVE**

- ▶ **Attract New Clients**
- ▶ **Retain Existing Clients**
- ▶ **Minimize Drawdowns**
- ▶ **Simplify Business Operations**
- ▶ **Improve Efficiency Through Better Technology**



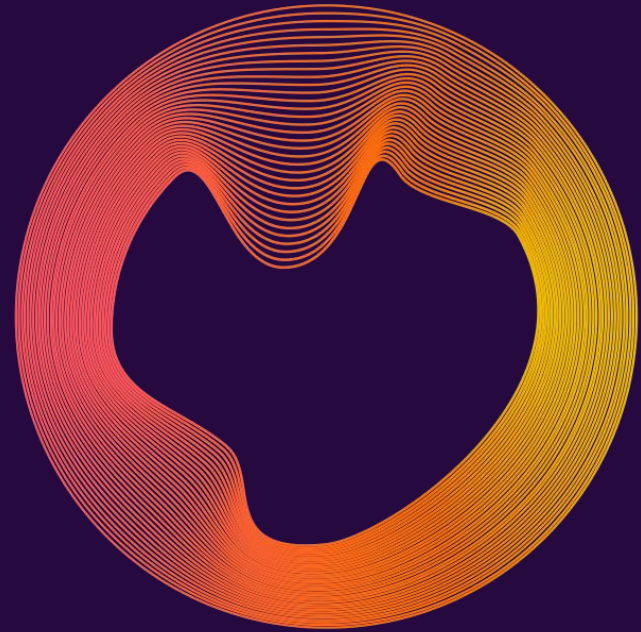


# Next **STEPS**

- ▶ **Demo the Investment Marketplace**
- ▶ **Test Drive the Advisor Experience**
- ▶ **Hit the EASY button and we will set up your own custom platform**







**UXWEALTH**

*Fortune Favors the **BOLD.***

# Compliance

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