

ABOUT US

DwellFi, is an AI-first company in the fintech sector specializing in the fusion of AI, blockchain, and tokenization technologies to support the scale, productivity, and growth challenges of the Asset Management industry.

OUR CLIENTS

Our award-winning SOC-2, Type 2 SaaS platform caters to Fund Administrators, Family Offices, and Private Funds across every asset class.

KEY DIFFERENTIATORS || WE LISTENED TO THE MARKET

DwellFi conducted 100+ focus groups with senior Asset Management participants to align our technology with transformative use cases that address the crucial challenges which impede their growth including:

- **Scaling Challenge:** Fund Administrators are confronted with complexities arising from the high volume of investors and the bespoke, often manual processes involved in investor onboarding and management.
- **Operational Inefficiencies:** Traditional investor onboarding and transaction processing, compliance verifications, and record-keeping across different data classifications are time-intensive and prone to human errors, leading to inefficiencies, higher risk exposure, and increased costs.
- **Siloed Solutions:** Fund Administrators must balance SEC-required manual tasks, like offline document handling, while enhancing investor interactions. New technology must also easily fit into their existing processes and systems.

OUR TECH, TEAM, AND TOOLS ARE MARKET PROVEN

Our clients trust that we understand their challenges, speak their language, and can help fuel their growth goals to help them in a very commoditized, competitive environment. We understand the unique challenges of being an early adopter, and have methodologies that help fast-track adoption internally within enterprise environments.

Technology built by Founders with a track record of disruption:

- Kumar Ujjwal | Founder and CEO, DwellFi, Revni, First PM at Punchh recent exit $500M. Two AI/ML Patents, Stanford Ignite @GSB.
- Deepak Sheoran | Founder and CTO, DwellFi, 15+ years building software infrastructure @Citadel, Rubrik, Walmart Labs, and EMC.

Team with deep roots and experience in the Asset Management Industry:

- Skyler Steinke | EVP and CRO, DwellFi, 4X Sales/Ops Leader @Trident Trust, Stonegate, Formidium, and Ultimus. Co-Founder of the Alt Funds Network. Blockchain Tech program @ MIT.
- Judith Peterson | CMO, DwellFi, 5X CMO/Head of Marketing @Ultimus, Formidium, Intertrust Group, FIS, and Seneca Capital, Steering Committee, Apex Women's Accelerator Network.
- Nathan Paitchel | Head of Business Development, DwellFi, 3X Strategic Business Development Lead @Digital Currency Group, Lightstone.

OUR TECH, TEAM, AND TOOLS ARE MARKET PROVEN (CONT'D.)

Tools and approach designed by seasoned consultants to fast-track adoption of enterprise solutions

- Yvonne Newlands | Head of Strategic Accounts, DwellFi, 3X Strategic Consulting @Accenture, PwC, and EY. Operations Lead @Apple. Degree in Engineering and MBA.
- Christa Kaur | Chief of Staff, DwellFi; 4X Senior Project Lead @Apple, Fidelity, AIG, Freddie Mac.

OUR UNIQUE VALUE || USE CASES THAT EMPOWER RAPID GROWTH

- **Scaling the Cumbersome Investor Onboarding Workload:** Leverage Gen AI services to transform your unstructured data (e.g., PDFs, spreadsheets, manual documents) into a digital investor workflow at scale.
- **Streamlining Internal Fund Administration Processes:** Utilize AI and blockchain to offload manually intensive processes and automate cash reconciliation, capital calls, distributions, waterfall calculations, and payments.
- **On-Chain Liquidity and Lending:** Instant, automated underwriting/lending.
- **Creating Custom and Secure Knowledge Bases:** Derive actionable insights from our AI-driven tools. fragmented data sources, enabling real-time business decisions.
- **On-chain settlement of secondaries:** Reduce settlement time of secondary transactions from months to days.
- **Developing AI Agents for GPs/LPs:** Empower investor relations via an AI Agent that delivers real-time access to fund insights and LP capital activity.
- **Easing the Burden of Switching Fund Administrators:** Streamline the process of transferring and reconciling fund data from one administrator to another, reducing the timeframe from months to days.

WHAT DRIVES US || OUR VISION

We're creating a future where fund management and administration are streamlined, automated, and accessible, fostering a thriving ecosystem where investment opportunities are democratized. By leveraging our unique blend of AI, blockchain, and tokenization technologies, DwellFi is setting new standards for scalability, operational efficiency, security, compliance, and investor engagement in the Asset Management industry.

OUR VALUES || FOR OURSELVES AND THE INDUSTRY

- **Modernization:** To be an AI-First company who embraces cutting-edge technologies and helps to modernize legacy systems within the Asset Management industry and foster more first-movers to AI, blockchain, and tokenization technology.
- **Efficiency:** Prioritizing solutions that automate tedious tasks, reduce operational costs, and free up valuable time for strategic decision-making.
- **Security:** Ensuring the highest levels of data security and compliance, implementing robust measures and protocols designed to safeguard all transactions, data, and assets, providing protection and peace of mind.
- **Transparency:** Promoting clear and open communication to provide stakeholders with the information they need for optimal decision-making.

KEY GROWTH STATS TO DATE

Total Funding Raised: $51.5M
Valuation: +300% in the last 4 months

#talktoDwellFi
Email: hi@dwell.fi