

The logo for ELARA, featuring the word "ELARA" in a bold, yellow, sans-serif font. The background consists of a solid yellow top section and a white bottom section, separated by a wavy, light yellow border.

EMPOWER WEALTH

**ENHANCING FINANCIAL ADVISORS: AI-DRIVEN WORKFLOW AUTOMATION,
TAILORED CLIENT SOLUTIONS, AND STRATEGIC LEAD DISCOVERY**

We address financial advisors' challenges: streamlining manual tasks, enhancing client personalization, and improving lead discovery.



Inefficient Manual Workflows

Financial Advisors and their support staff spend over 40% of their time executing routine, manual tasks



Hyper Personalization at Scale

Without high level of tailored advice investors are quick to move to lower-cost providers such as robo-advisors.



Consistent, Pre-Qualified Lead Generation

Lead generation is experiencing a significant transformation. The traditional methods of cold calling and automated matching are outdated.

Introducing Elara: Revolutionizing financial advising with our AI assistant that simplifies operations, enhances client engagement, and accelerates lead generation.

Elara AI



Enhances financial advisory efficiency through workflow automation



Leverages untapped data for predictive insights and personalized solutions



Strategically links high-net-worth service providers to foster growth via a robust referral network.



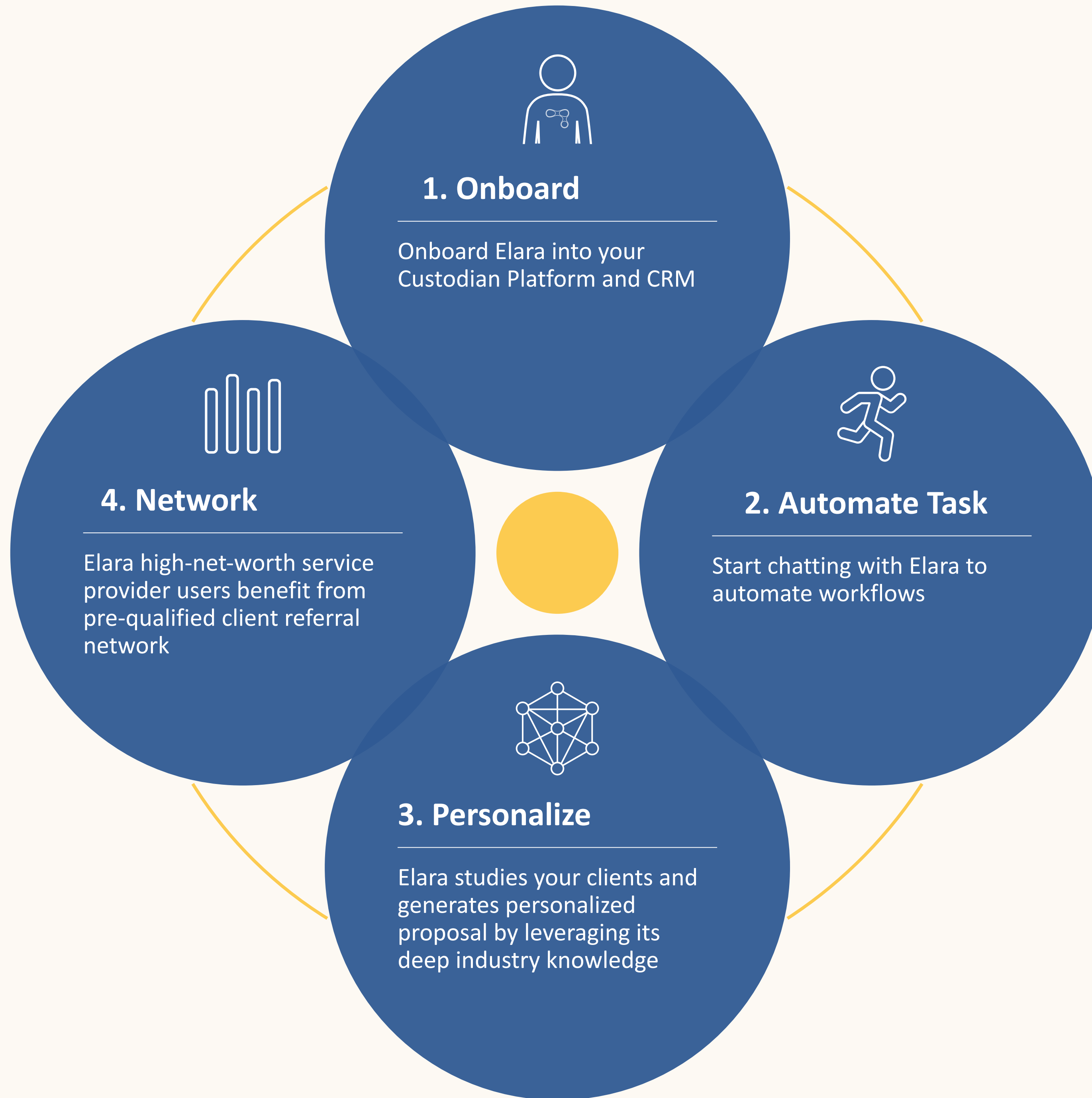
Ultimately bolsters wealth managers' market leadership in a competitive environment

Wealth Management is primed for digital transformation, with increasing demand for AI-driven solutions

According to recent McKinsey, Accenture and Deloitte reports:

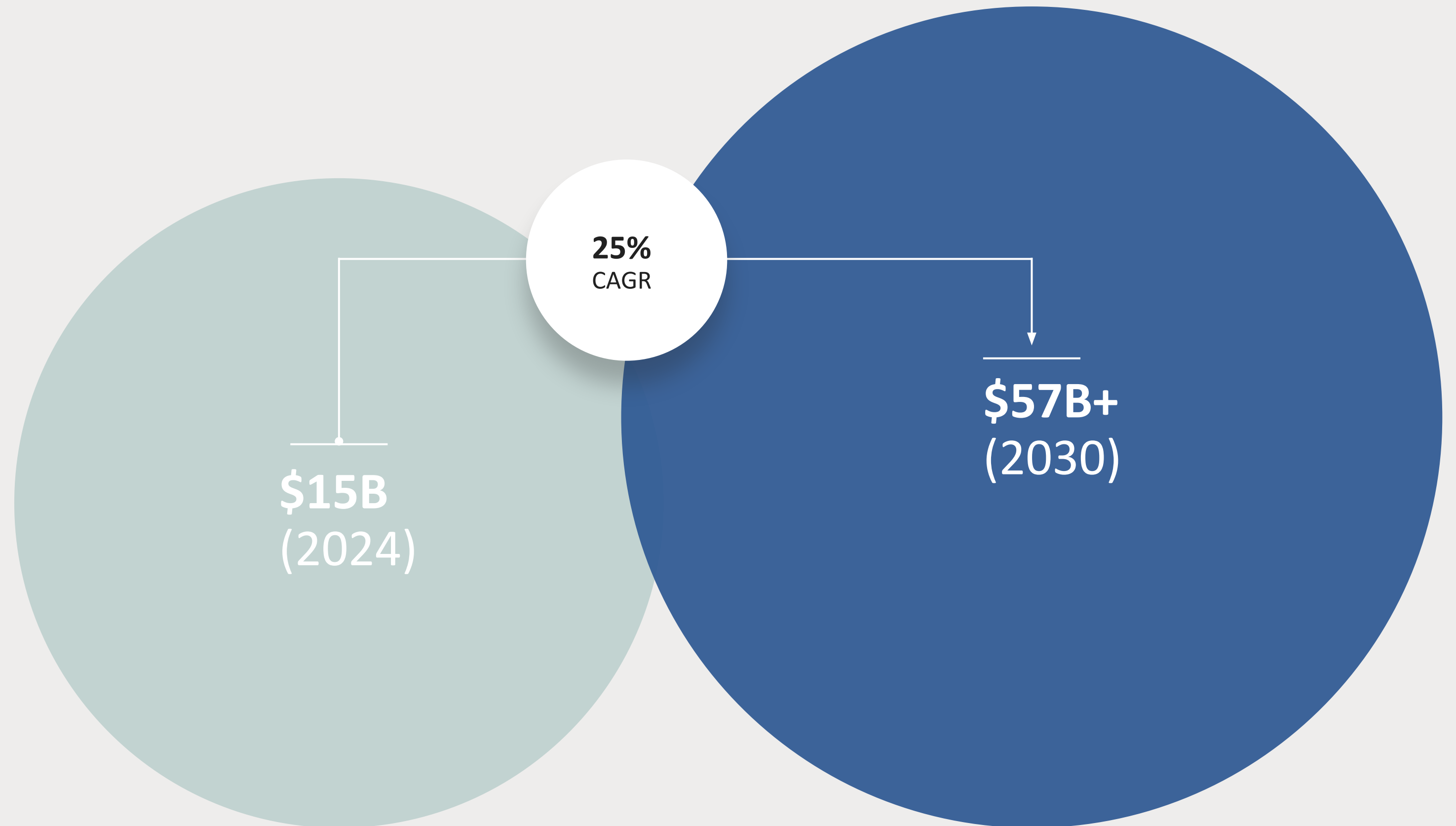
8 out of 10 Advisors:

- Believe that AI-powered notifications in real-time would be one of its clearest and measurable benefits
- Prefer to use AI tools to automate time-consuming and manual tasks
- Believe AI's greatest benefit is translating the clients' data into actionable insight for their best interest
- Experience Rising Client Expectations for Personalized Solutions



“Our target market is large and growing fast...”

- There are more than 300,000 wealth managers in the US alone as of 2024, significantly more considering other developed markets such as Europe, Middle East and South-East Asia.
- More than 1600 advisors become independent advisory firm annually.
- WealthTech industry is expected to grow at 25% CAGR in the next 10 years reaching expected revenue of \$57B+ in 2030.



Source: <https://www.360marketupdates.com/global-wealthtech-industry-research-report-2023-competitive-landscape-market-22357184>

Attribute/feature	Cognicor	ELARA
User Experience	Too complicated UX/UI	User friendly
Price	Expensive	Affordable / Tiered
Industry Exposure	Low	5+ years of experience in Top Tier Wealth Management Firms
Lead Generation	No	Referral Network

MONTHLY SUBSCRIPTIONS

TIER 1

\$199

- Integration with major Custodians and CRMs
- Single User
- Up to 100 clients book of business

TIER 2

\$499

- Tier 1 +
- 2 additional users
- Up to 250 clients book of business

ENTERPRISE

\$799+

- Enterprise Model
- Unlimited Users
- Unlimited client book of business

We sell directly to U.S. Wealth Management companies with a focus on small and medium size Independent RIA firms

CONFIDENTIAL



Target customers

- Small and medium size independent RIA firms
- Breakaway financial advisors
- Enterprise Wealth Management Firms



Target contacts

- Financial Advisor
- Head of Technology
- VP of Growth



How we reach them

- Direct outreach
- Strategic partnerships
- Digital marketing

Road Map

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Launch Phase

Product development, beta testing with select firms, key integrations with essential platforms.

Expansion & Growth

Increase market penetration, enhance product features, bolster customer support and training

Q2-Q3 2024

Q4
2024

2025

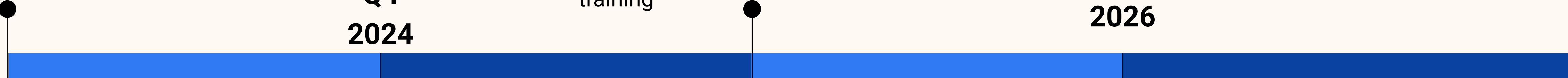
2026

Market Entry

Official launch the in the US market, onboarding the first cohort, focusing on gathering and implementing feedback for product refinement.

Product Enhancement & Strategic Alliances

Major updates to enhance automation and predictive analytics, expand the AI-driven referral program, explore international market.



Team Experience



Azer Karimov

Co-founder & CEO

- 5+ Years of Experience in Wealth Management.
- Ex. VP - J.P.Morgan, BofA Merrill



Abay Bektursun

Co-founder & CTO

- 8+ Years of Experience in Computer Vision and AI.
- Ex. Apple, Eagle Eye Networks, Hewlett Packard Enterprise



Gudrat Guliyev

Co-founder & COO

- 3+ Years of Experience in Venture Capital and Consulting.
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- Ex. Starta Ventures, Ernst & Young

Thank You

ELARA

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