

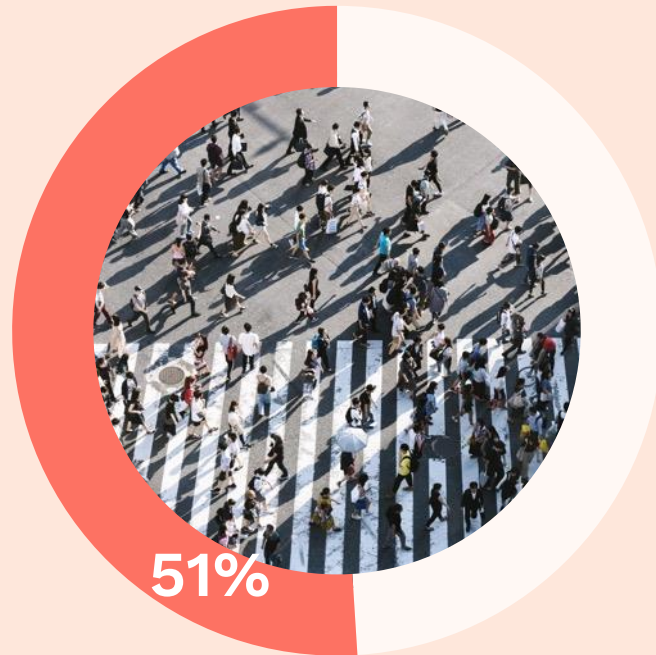
smartpurse

Making you smart with money

olga.miler@smartpurse.me | jude.Kelly@smartpurse.me

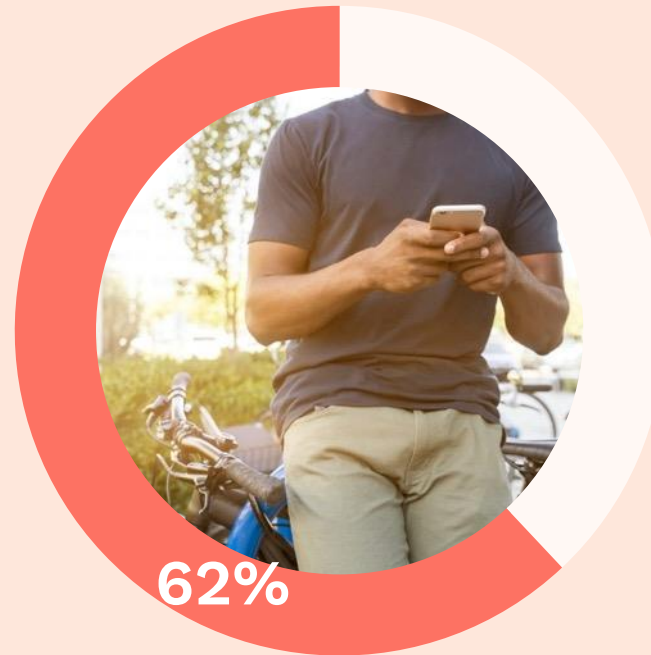
Financial literacy is a huge opportunity

Globally



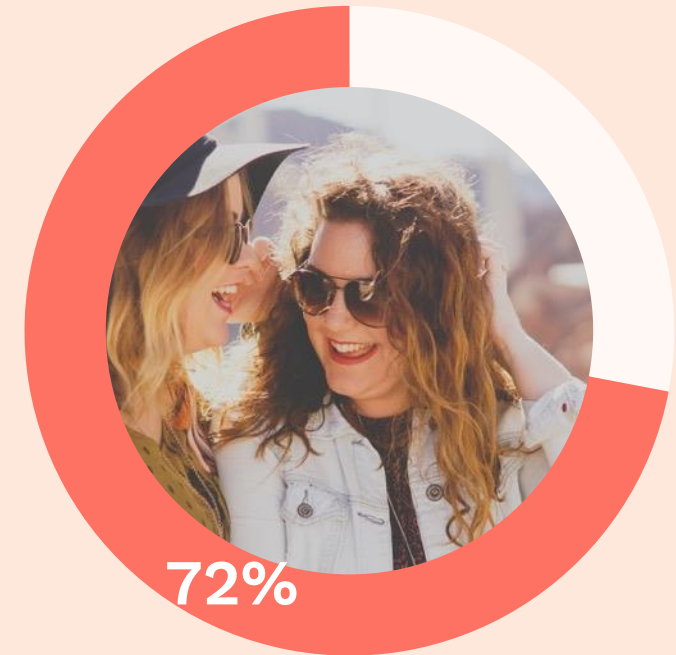
do not reach the min-score for basic financial literacy.¹

Young people



Of 18-29 old in Switzerland save without having a proper target and without knowing how they could invest.²

Women

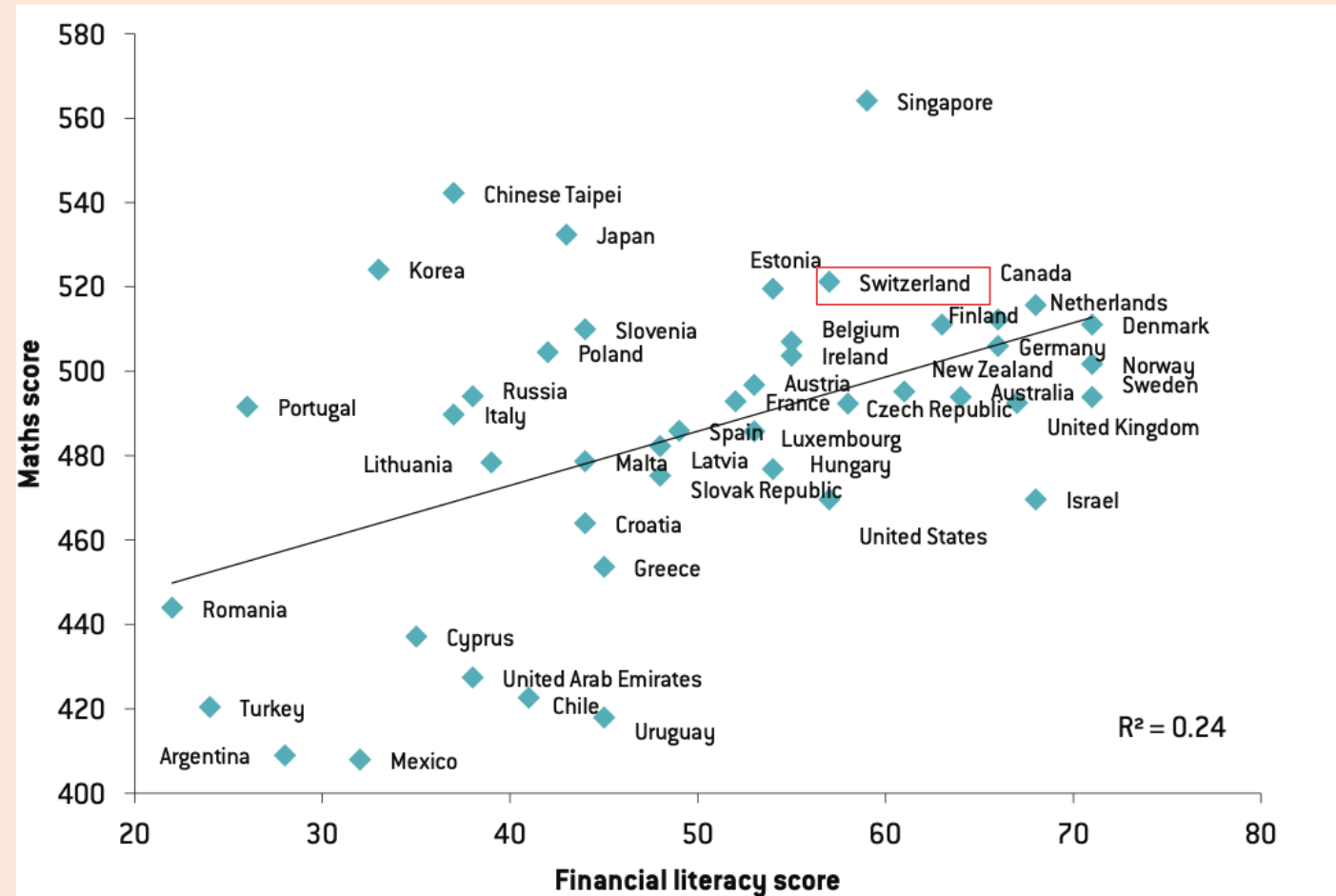


Say they should do more with their money, 6 out of 10 rate their understanding of main investment possibilities as below average to poor.³

Switzerland is no exception

5 out of 10 main worries relate to money

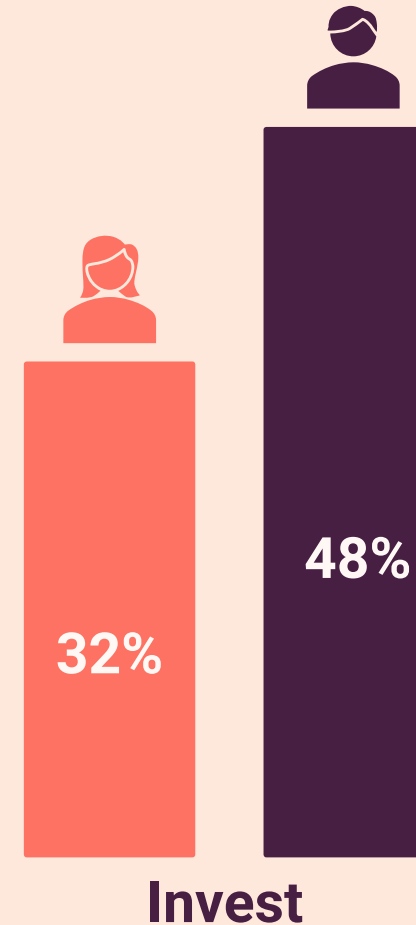
- Health insurance costs
- Retirement / AHV
- Inflation



Sources: <https://theatlant.com/charts/VJDhtA8Xe/> https://www.bruegel.org/wp-content/uploads/2018/05/PC-08_2018.pdf/

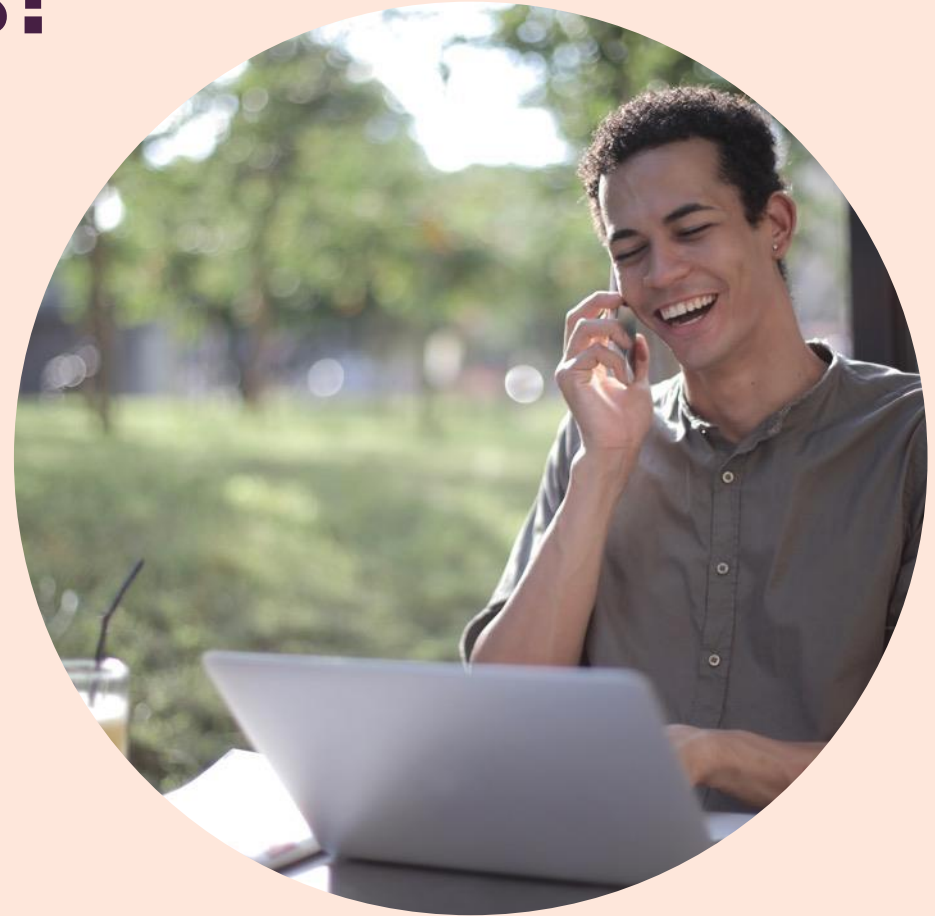
Knowledge drives investment behavior

27% of men and **18% of women** rate their financial knowledge as good



Opportunity for employers?

81% of millennials and 75% of Gen X are more likely to be attracted to another company that cares more about their financial well-being.



Why is financial education a challenge for financial services?

**Side activity,
not core
competence**

**Expensive
content
creation**

**Pressure to
meet
business
targets
impact
content**

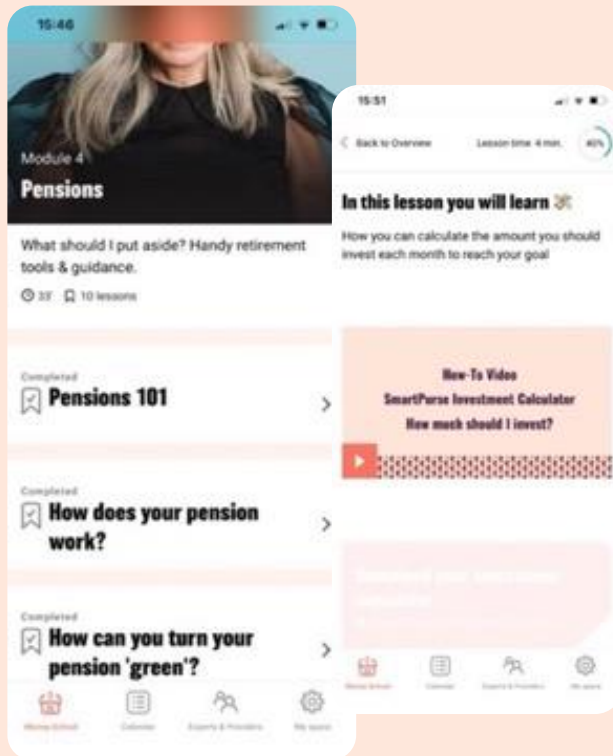
**Regulatory
framework
and internal
guidelines**

**Lack of
tools and
engaging
channels**

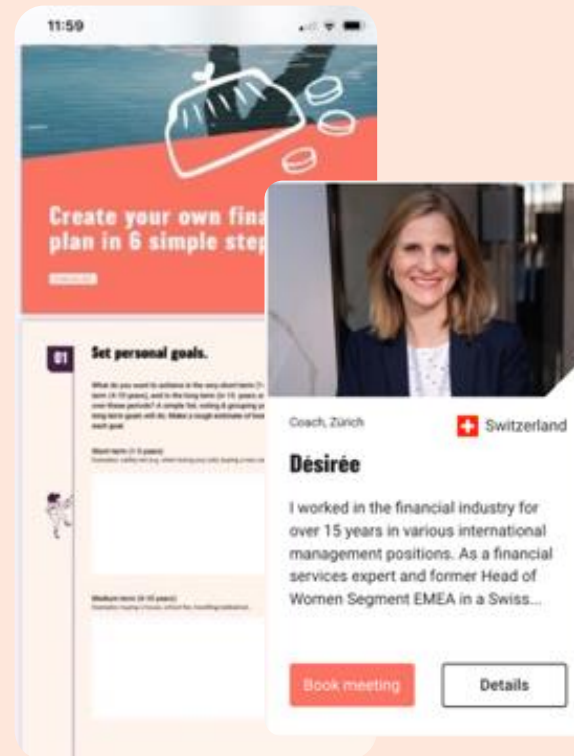
smartpurpse

Europe's pioneering platform for inclusive financial planning and education as a service

1 Learn



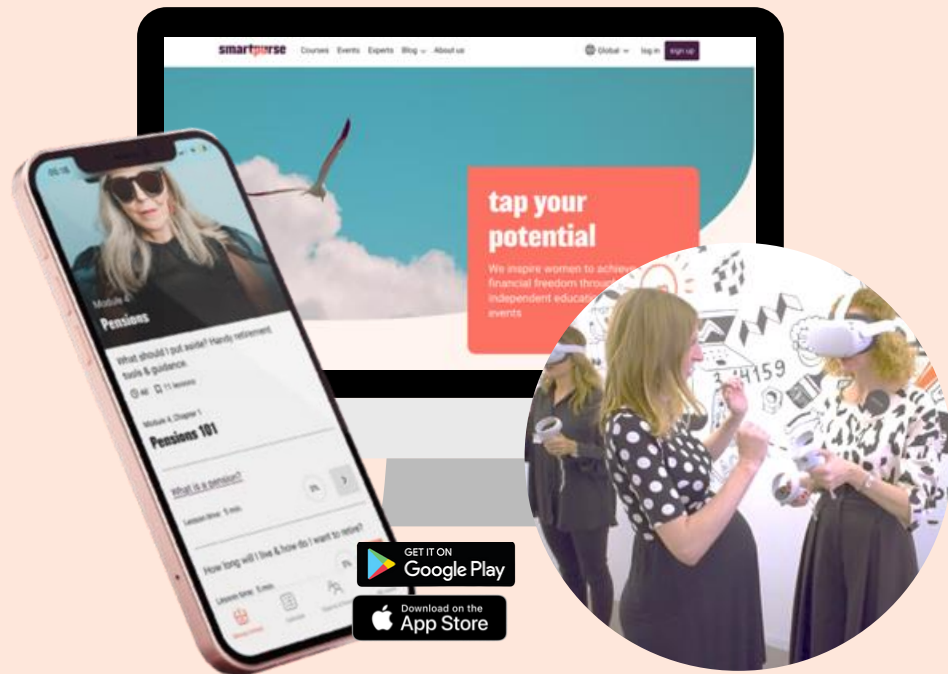
2 Find



3 Grow



How does it work?



Integrated Webplatform, App and Metaverse Studio

smartpurse.me

Key features

- **Test your knowledge and measure your financial health**
- **Over 80 micro-lessons of 3-5 minutes in German and English (video, audio)**
- **Templates and calculators**
- **Interactive quizzes and self-learning tests**
- **Personalised nudges/notifications and news**
- **Expert finder for human experts and providers**
- **Live events and webinars**
- **As of Q4 2023: interactive glossary and term learner**
- **As of Q4 2023: earn points and rewards for good money behaviour**

Financial education as a service



License or white-label our content and plug it into to your solution or distribute off the shelf



Access a booming, ready to invest audience by including a profile on our platform



Use our unique expertise to create bespoke financial education



Upgrade your experience by training your advisors with our masterclass or test your solutions in our dedicated lab

Expert and co-creation partnerships



Education programs



Thank you!

Olga Miler

olga.miler@smartpulse.me | +41 76 576 45 19

smartpulse.me

👉 Try our app:



THIS PRESENTATION AND ITS CONTENTS ARE PROPRIETARY TO SMARTPURSE LIMITED AND BY ACCESSING THIS DOCUMENT, THE READER ACKNOWLEDGES, ACCEPTS AND AGREES THAT:

The information, contents and subject matter contained in this presentation (the "Information") are highly confidential and are to be kept in strict confidence. No part of this presentation or its Information may be modified, reproduced, disclosed, published, distributed or revealed to any person without SmartPurse Limited's prior written consent.

The Information may solely be used in connection with the consideration as to whether and/or how to participate/contribute to the business activity proposed herein (the "Activity") and must not be used to derive any works or for any other commercial or public purposes.

Copies of the Information may only be made as are reasonably necessary and on a strict need-to-know basis.

All necessary steps to preserve the confidentiality of the Information and ensure that all Information is reasonably protected against theft, damage, loss or unauthorised access have been, are and will continuously be taken.

FURTHERMORE, THE READER AND/OR DISTRIBUTOR OF THIS INFORMATION, AS THE CASE MAY BE, HEREBY AGREES AND COVENANTS THAT:

He/she shall not directly or indirectly, interfere with, circumvent or attempt to circumvent, avoid, by-pass, or obviate SmartPurse Limited's interest as related to the Activity or any on-going or future derivation thereof, and shall (where applicable, procure that others shall not), whether for their own account, or on behalf of any of their customers, clients, prospective customers and clients, funders and prospective financing partners, consultants, associates, agents, representatives, contractors, sub-contractors, service providers, subsidiaries, holding companies, branches, or professional service providers, establish contact, directly or indirectly, with any entity or person that is identified or introduced by SmartPurse Limited in connection with the Activity without the prior written consent of SmartPurse Limited.