



OR

a Prashad

an existing customer who started using when the product first launched and have since found great value in it. prep2grow has made investing simple, stress-free and extremely safe because of how on-point their recommendations are and how awesome their customer service is. You have an actual person who picks up calls and walks you through the process you may have. I have personally referred many people to this site and will continue to do so. prep2grow has a bright future and I want to be a part of it.

raised \$10,000 this round & \$10,000 previously

[Learn about Lead Investors](#)

prep2grow.com Mountain View CA

Software Technology Analytics Fin Tech Saas

OVERVIEW UPDATES 2 WHAT PEOPLE SAY 34 ASK A QUESTION 9

Highlights

- 1 📈 61% month-over-month revenue increase & 35% month-over-month
- 2 💰 \$575K+ ARR in the first 12 months, with 3 out of 12-months being profitable.
- 3 🔥 8K+ subscribers in the first 12-months
- 4 🏆 Disrupting the \$1T Advisor market by providing an institutional Quant approach to retail investors.
- 5 ✅ Simplify the investing process down to a single 1-click.
- 6 👥 Proven team that created AI solutions, used by 100s of millions of consumers while at Amazon, Oracle, & IBM
- 7 🍌 prep2grow's first funding milestone of \$100K was 100% funded by 130+ customers.

Our Team



Brian Gaspar Chief Executive Officer

Brian has built & led high-performing teams that delivered innovative, high volume, highly regulated and multi-million user products at companies like Amazon, Oracle, & CareerBuilder. He has 7 patents in the areas of Data Science & AI.

The founding team firmly believes and is passionate about delivering a combination of Big Data and AI that accurately predicts future company events that will impact how a company will perform and what could be done to improve that performance.



Joseph Hui Chief Technical Officer



Joe brings deep technical and product development experience to prep2grow across development, architecture and consulting at companies like Oracle, Sybase, and multiple startups. He has several patents in the areas of software design.



Hugh Hui Chief Operations Officer

Hugh brings technical, implementation and operations experience to prep2grow ranging from AI development, project management, consulting to operations at companies like EDS, Oracle, Accenture, Deloitte, IBM, and multiple startups.

Pitch



The Problem

People lack the means and/or the patience to obtain solid investment returns and pay Robo-Advisors \$2.2B or Financial Advisors \$1.5T annually who historically underperform the S&P 500 by more than 50%.



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The Solution

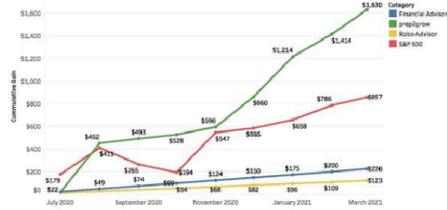
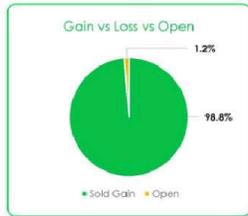
prep2grow improves an existing portfolio or creates and grows a new personalized portfolio using no fee equities or alternative investments that have historically outperformed the S&P500. These portfolios can be bought and sold via a single click on commission free stock trading platform, such as TD Ameritrade or eTrade.



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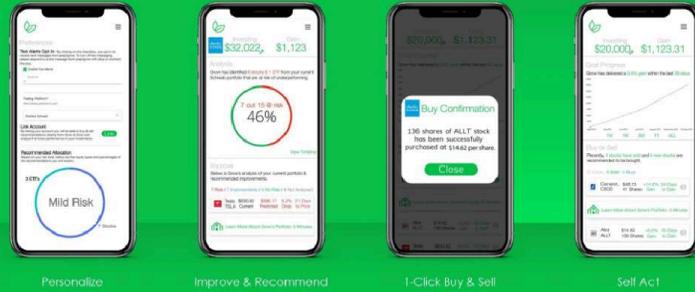


With a \$5,000 starting portfolio, prep2grow's stock recommendations* have returned a 32% gain vs a 17% gain from the S&P 500.



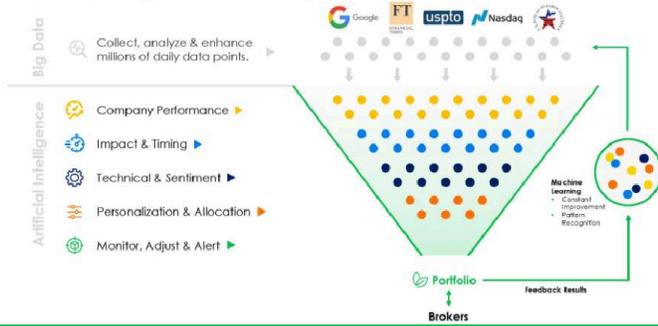
*Since prep2grow's launch on 7/1/2020 to 3/31/2021. [Download Trade History](#)

Product



Product Platform

Institutional Quant Approach to Retail Investing



Traction

Net MRR
\$24.8K
27%(MoM) Growth

LTV / CAC Ratio*
3.1
22% LTV(MoM) Growth
LTV: \$369.70 / CAC \$117.75

Subscribers
7K
61%(MoM) Paid Growth

YouTube
5K Subs
35%(MoM) Growth

9-Month Avg. Daily Conversion with Daily Ad Spend of \$824.48**

	Impressions	Clicks	Freemium Subscribers	Paid Subscribers
Count	6,942	223	36	7
Conversion \$	\$0.12	\$3.70	\$22.90	\$117.75
Conversions %		3.2%	16.1%	19.4%

*Cumulative average since sites started on July 1, 2020
**Ad run Monday-Thursday from 5AM to 11AM via Google Ads & for single persona

Business Model

Freemium Subscription

- Focus on Conversion

Paid Subscription

- Tiered Content
- \$25 to \$99**



- Time Based Content

- Tiered Features
- Time Based Content **\$79 to \$999** Annually

AVG Paid Retention
7.5 Months
(9 Months of Selling)

Lifetime Value
\$369.70

AVG MRR per Subscriber
\$48.86 / 7%
(MoM) Growth

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Addressable Market

Total Addressable Market

Broker	Funded Accounts*	AVG Account Size*
Schwab	29,600,000	\$195,946
Robinhood	13,000,000	\$1,538
Fidelity	32,000,000	\$103,438
eTrade	7,200,000	\$82,778
TD Ameritrade	11,500,000	\$114,783
Merrill Lynch	67,000,000	\$41,045
Webull	1,000,000	\$30,000
Interactive Broker	981,000	\$236
	162,281,000	\$71,220

prep2Grow's 2 Year Targets

Year 1 Target

- 8K Paid Subs
- 53K Freemium Subs
- \$3.8M in Revenue
- \$4.3B in Portfolios

Year 2 Target

- 16K Paid Subs
- 106K Freemium Subs
- \$7.7M in Revenue
- \$8.7B in Portfolios

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This slide contains forward-looking projections that cannot be guaranteed.

Go-To-Market

Targeted Personas



Day & Short-Term Trader (\$2.2M People*)
I have limited money, zero time, and want returns in days to weeks that will help me increase the income for my family. I want the largest possible return per trade as soon as possible.



Long-Term Investor (13.4M People)**
I just left or will leave my financial advisor for underperformance. However, investing is complicated, requires several hours a week, & my own annual returns still underperform the market. I want a higher annual return.



SMB Financial Advisors (0.3M Advisors*)**
I need to spend additional time retaining and expanding my client base. I need to get my current and future clients an annual return that will retain them.

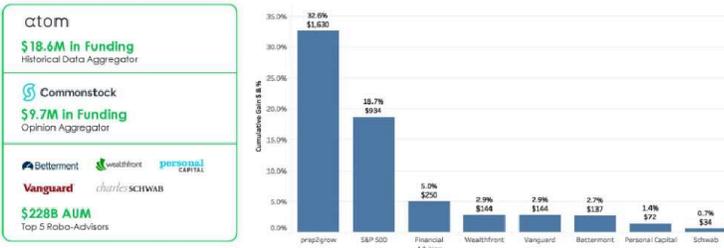
Targeted Channels

- Customer Retention / Conversion
- Search / Social Ads
- SEO
- Customer Referrals
- Social Community / Influencers
- Direct Sales via Support

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Competitive Advantage

All competitors utilize their own low-performing / high-fee investment vehicles or are aggregators of historical and opinionated data that force people to do the work of trading. prep2grow uses AI and Big Data to aggregate, analyze, recommend trades, & do the work of trading for them.



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Seed Funding Needs

Care Expansion Ongoing
Move all Data Science to AWS, expand integrations, testing environments, & tightening of existing features.

Complete US Equities Q4 FY2021
Expand Data Science to include all applicable ETFs, Mutual Funds, SPACs, & Stocks.

Asset Backed Token Q1 FY2022
Creation and release of prep2grow's asset backed token and Implement Data Science for cryptocurrencies.

Social & Community Q1 FY2022
Release capabilities necessary to foster private & public trading communities.

SMB Advisory Q2 FY2022
Release portfolio management, analysis, client relations product to Small and Medium sized financial advisors.



Core Sales & Marketing
Ongoing

Improve onboarding flow. Expand search ads to all personas and continuous ad running. Implement foundational SEO needs to achieve customer acquisition of 60%.

Customer Support
Q4 FY2021

Establish sales-oriented customer support and social moderator team to handle support issues, foster communities, and upsell.

Direct Sales
Q1 FY2022

Establish sales team and expand customer support team to sell and support the SMB Advisory product.

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Founding Team



Brian and Joe have worked together since 2005 when they jointly defined, designed and developed the first merged product solution of PeopleSoft, Oracle, and Siebel. They began working on prep2grow in 2009 and the tool was initially focused on predicting company performance.

Brian Gaspar
CEO

has built and led high-performing product development teams that delivered innovative, high volume, highly regulated, multi-million user and multi-thousand customer solutions of companies like Amazon, Oracle, Cisco and CareerBuilder. He has 7 patents in the areas of Data Science, Artificial Intelligence, and Augmented Reality.

Hugh Hui
COO

brings technical, implementation and operations experience to prep2grow ranging from AI development, project management, consulting to operations at companies like ED5, Oracle, Accenture, Deloitte, IBM, and multiple startups.

Joseph Hui
CTO

brings deep technical and product development experience to prep2grow across development, architecture and consulting at companies like Oracle, Sybase, and multiple startups. He has several patents in the areas of software design.

