



ABOUT OUR COMPANY

The company was founded with a clear goal to create a change in the way financial companies, advisors and their clients work and bring greater value to both the companies and their clients.

OUR VISION

Our vision is to create a leading platform of interactive solutions to analyse information received from our clients about their financial needs and provide them with a comprehensive financial planning in one easy and friendly interface.

OUR MISSION

Our mission is to help financial advisors, companies and institutional manage and make meaningful and relevant relationships with their clients while maintaining and enhancing their ability to provide excellent service, grow and enhance profitably.

OUR TEAM



Yuval Eisenberg CEO & Co-Founder

Over 17 years of experience as a senior manager in the major investment companies in Israel. An entrepreneur in the fields of real estate and Finance in Israel and around the world.



Keren Katri CTO & Co-Founder

Mamram graduate - IDF's Center of Computing and Information Systems. Over 25 years of experience in high-tech companies (ERP, Cyber) in senior positions of database management, systems analysis, and product management.

STRENGTHS

- **The team:** senior executives from the finance and high-tech world with over 20 years of experience.
- **System Interfacing and Synchronization** through a professional customized, Dashboard with No CRM changes require.
- **Streamlining** the sale and retention of financial consultants from varied field.
- **A data analyzing system**, processing data entries obtained from numerous sources to generate suggestions for implementation and call to action.
- **Big Data system** ranging over vast collection of topics
- **Wide range of activities** available for financial consultants and advisors: private and business: credit, cash flow and family economics, investments, insurance, tax consultants ,CPA, attorney and more.

OPPORTUNITIES

Today's technology supports the activities of financial consultants . Nevertheless, the existing support of data and methods used today by financial institutions are limited and that is the strength of the opportunity of the CFO system.

- 1 .THE CFO SYSTEM communicate the various systems and requirements, resulting in cumbersome operation.
- 2 .THE CFO SYSTEM work and speak a single language .
- 3 .THE CFO SYSTEM fully reflects a comprehensive and complete status overview in one place easily accessible .

THE CFO SYSTEM is The a solution which required and will efficiently consolidate a number of effective solutions and streamline today's conduct.

HOW DOES IT WORK



Improving work processes

1. Improving work productivity and data analysis.
2. Featuring fast analysis and quality leads to end user.
3. Increasing user duration and retention by providing system access to the end user.



Increase profitability from end user

1. Magnify sources of income.
2. Reduce work time to increase profitability.
3. Improved sales monitoring, and customer retention.



System synchronization

Synchronization between different technological systems generating work process improvement. Allowing end user to obtain significant information, improving- decision making, communication and work with financial professionals.



Decision-making supporting system

A B2B2C system marketed to professionals, companies and institutional. Aimed at analyzing information stored as a big data, with the main purpose of monitoring information and leading the end user in the decision-making process and drive into action.



System Profitability Model

1. Selling STAND ALONE system or SASS cloud licenses.
2. Selling system licenses to end user.
3. Credit granting and lead sourcing through the system.



WIN WIN WIN

WIN for the financial professional user : Improve work processes, sales & customer retention and increase profitability

WIN for end user : Presenting quality financial status leading to faster and more professional response

WIN for system: A multitude of options for creating internationally tailored revenue sources.

WIN for everyone: High-value, low-cost

THE SYSTEM



Big Data Analysis



END USER



USER



Advantage Over Competitors



SYSTEM

END USER INFORMATION

Action recommendations based on comprehensive and up-to-date information

