



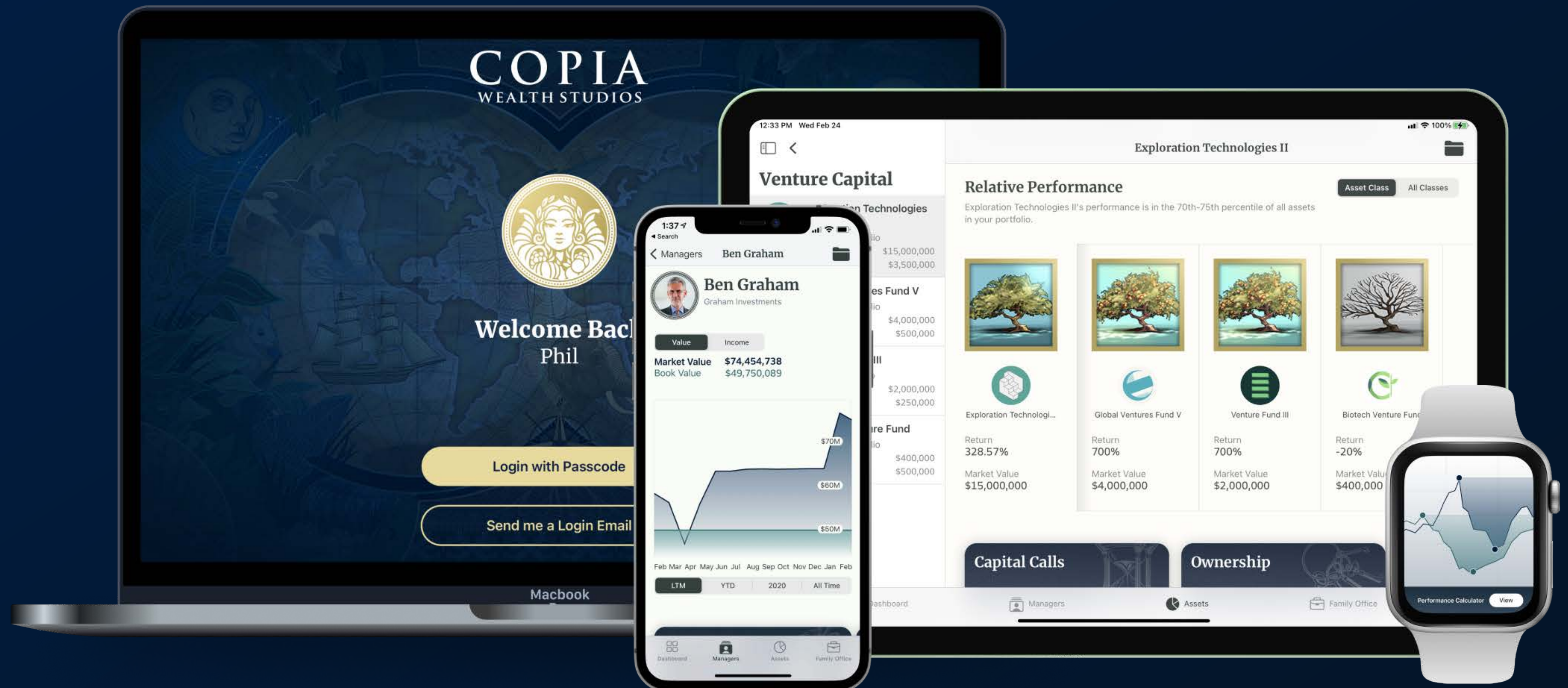
COPIA
WEALTH STUDIOS

The background of the image is a dark blue field filled with a repeating pattern of US dollar bills. The bills are oriented horizontally and are slightly offset from each other, creating a sense of depth and texture. The pattern includes various denominations, with the faces of presidents and the intricate details of the bills visible. The overall effect is a rich, textured background that suggests wealth and finance.

Our mission:

Simplify Wealth.

Copia is a financial intelligence platform that puts you at the
Helm of your Wealth.

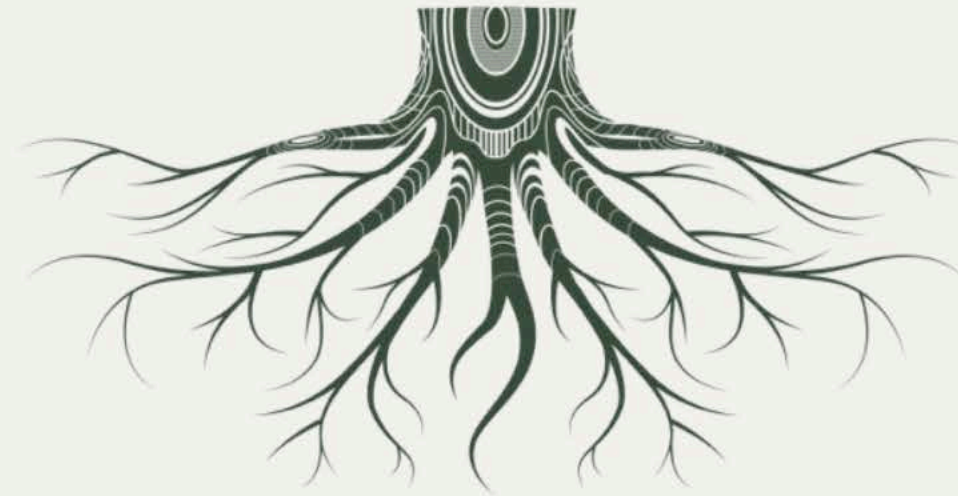


Answer Smarter Questions



PRESERVE

How can I safeguard my life's work and family's success from unintentional negligence and black swan events?



GROW

How can I compare my entire portfolio (including my alternative assets) against the benchmarks that matter to me?



VALIDATE

Who were my top-performing managers, net of fees, and how do they stack up to their peers?

Insight + Perspective = Wisdom

Portfolio management is antiquated and time-consuming. Most platforms are glorified Excel spreadsheets- with all the hours that implies.

Copia consolidates your asset classes, no matter what or where they are.



Copia goes beyond reports to
Assets Under Intelligence.

Transactions

Find in table

Investment Type (1) Bond

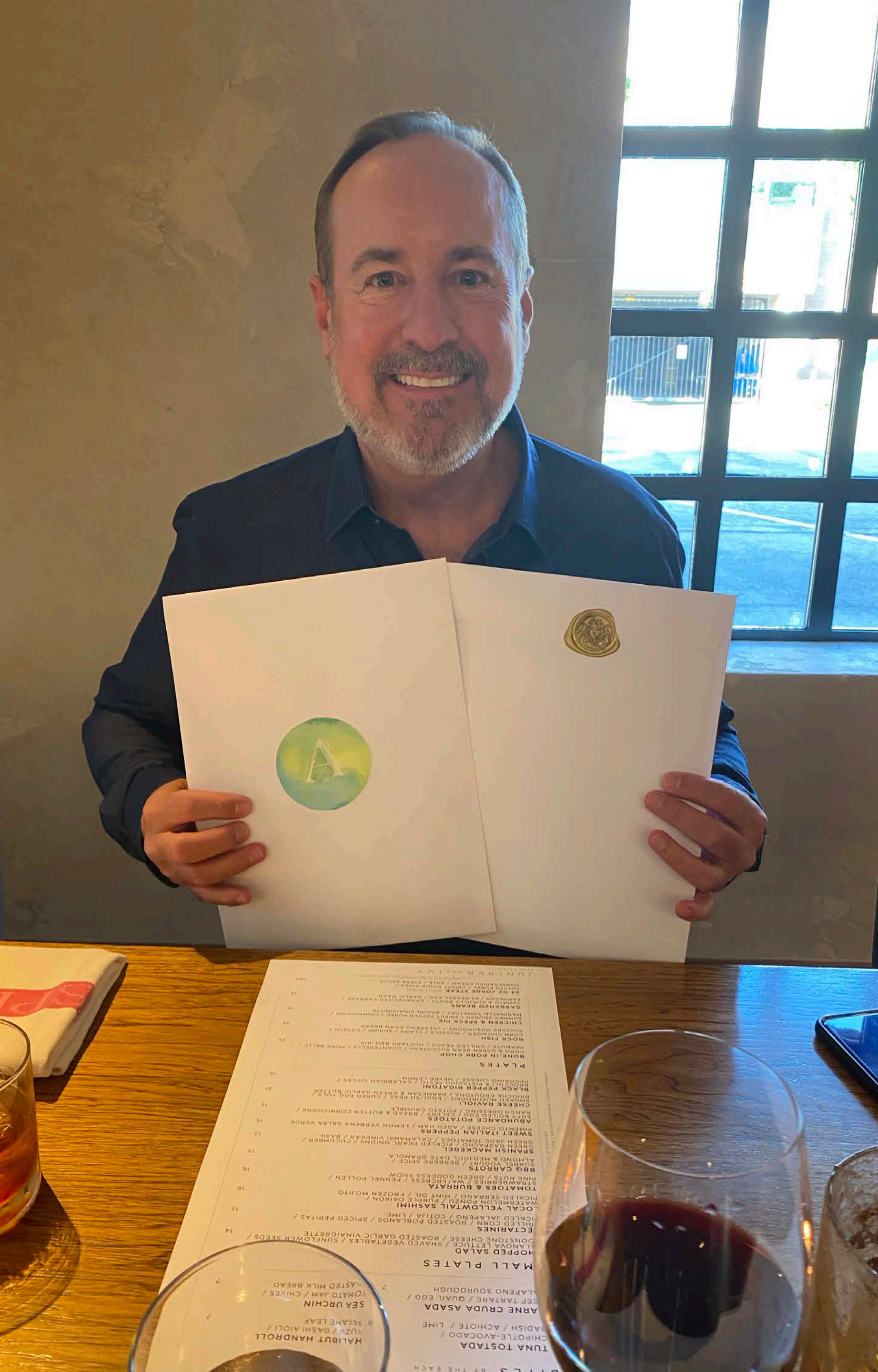
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	VALUE	COST BASIS	ACCRUED INCOME	COUPON RATE	YEARS TO MATURITY
	\$50,681,042	\$32,408,772	\$272,147		
Rev 4....	\$2,879,822	\$2,879,822	\$0	4.22%	2.4
GO 4....	\$2,407,390	\$2,399,890	\$7,500	4.40%	2.9
% Due...	\$1,926,000	\$1,919,837	\$6,163	6.00%	9.2
Dec 31...	\$1,921,268	\$1,919,998	\$1,270	3.00%	0.9
Due Ju...	\$1,726,178	\$1,724,298	\$1,880	3.75%	1.4
edium ...	\$1,564,408	-	\$0	2.20%	-0.9
TR Rev...	\$1,439,927	\$1,439,927	\$0	3.95%	-2.1
RT SR...	\$1,436,210	\$1,461,898	\$6,689	1.85%	1.8
T B/E ...	\$1,417,271	-	\$0	5.75%	-2.1
World...	\$1,384,068	-	\$0	1.38%	-2.5
LLC SR...	\$1,303,444	\$1,341,795	\$15,209	5.15%	0.3
YS Re...	\$1,053,068	\$1,040,493	\$15,015	5.00%	9.7
f Toll B...	\$963,255	\$959,904	\$3,351	3.90%	10.9
30 % ...	\$962,778	\$959,947	\$2,831	4.30%	14.9
th Wa...	\$959,760	\$959,760	\$0	4.00%	-1.1

Existing solutions solve for the RIA,

Not the Wealth Owner & Family team directly.

- Presentations are primarily spreadsheet format (see left image) and not interactive.
- They don't provide a high fidelity view of alternative asset classes.
- Their customers are Advisors not the actual Wealth Owners (implies business model).
- They use humans vs Ensemble AI technology to ingest statements.



“Before Copia, I spent **more time trying** to piece together my wealth since my exit than I did running my company.”

— Chris Lee

Team Accolades

Our team has many accomplishments over the last decade as we have built, contributed to, founded and invested in:

- Global #1 Applications (100M+ users)
- Multiple Exits including one to Slack
- Deloitte Fast 500 Companies & Inc. 5000 Companies
- Companies with billions of dollars in AUM from the world's most sophisticated investors
- And we've been named the Ernst and Young National Entrepreneur of the Year



Forbes



Deloitte.
Technology Fast500





Thank you.

*"Life is no 'brief candle' to me. It is a sort of splendid torch which I have got hold of for the moment;
and I want to make it burn as brightly as possible before handing it on to future generations."*

—GEORGE BERNARD SHAW

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