



EFRONTIERS

**AI Powered Sales Platform for
Financial Institutions**

David Giron, Founder
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The Financial Industry by the Numbers



\$90 Bn

**Marketing Spend by
Financial Industry**

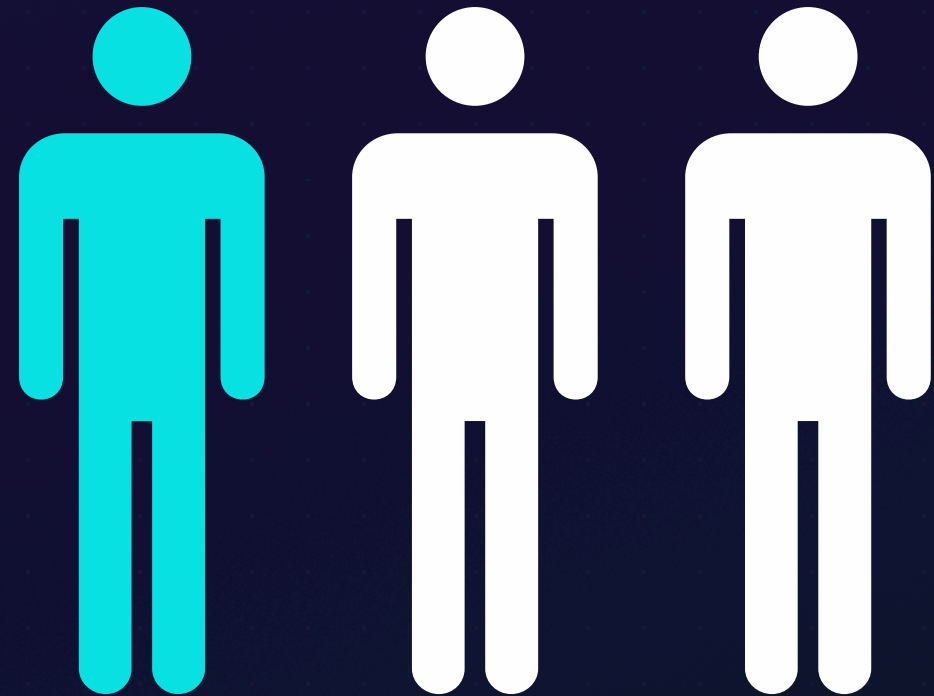


>\$10 Tr

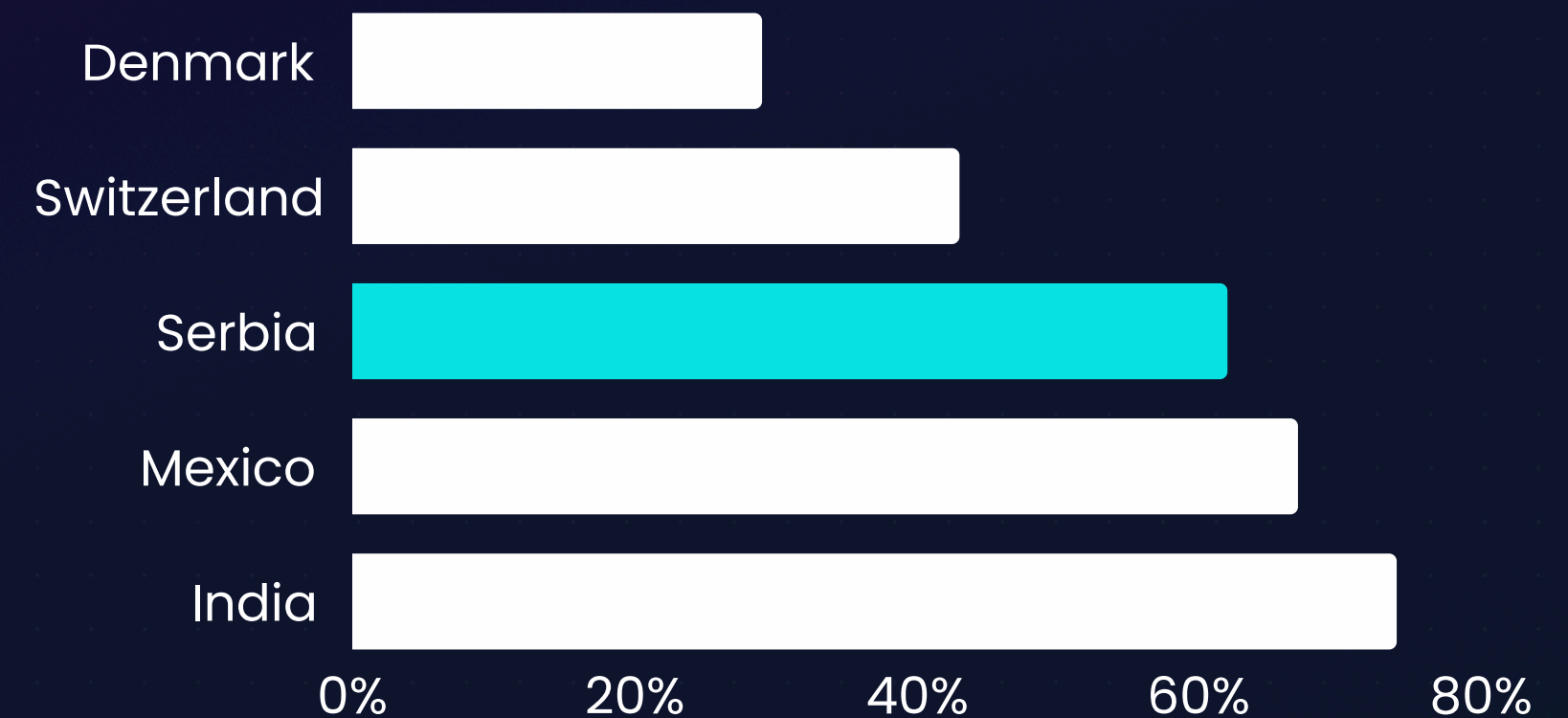
**in Savings and Low
Yield World Wide**

Financial Illiteracy: The Industry's Hidden Problem

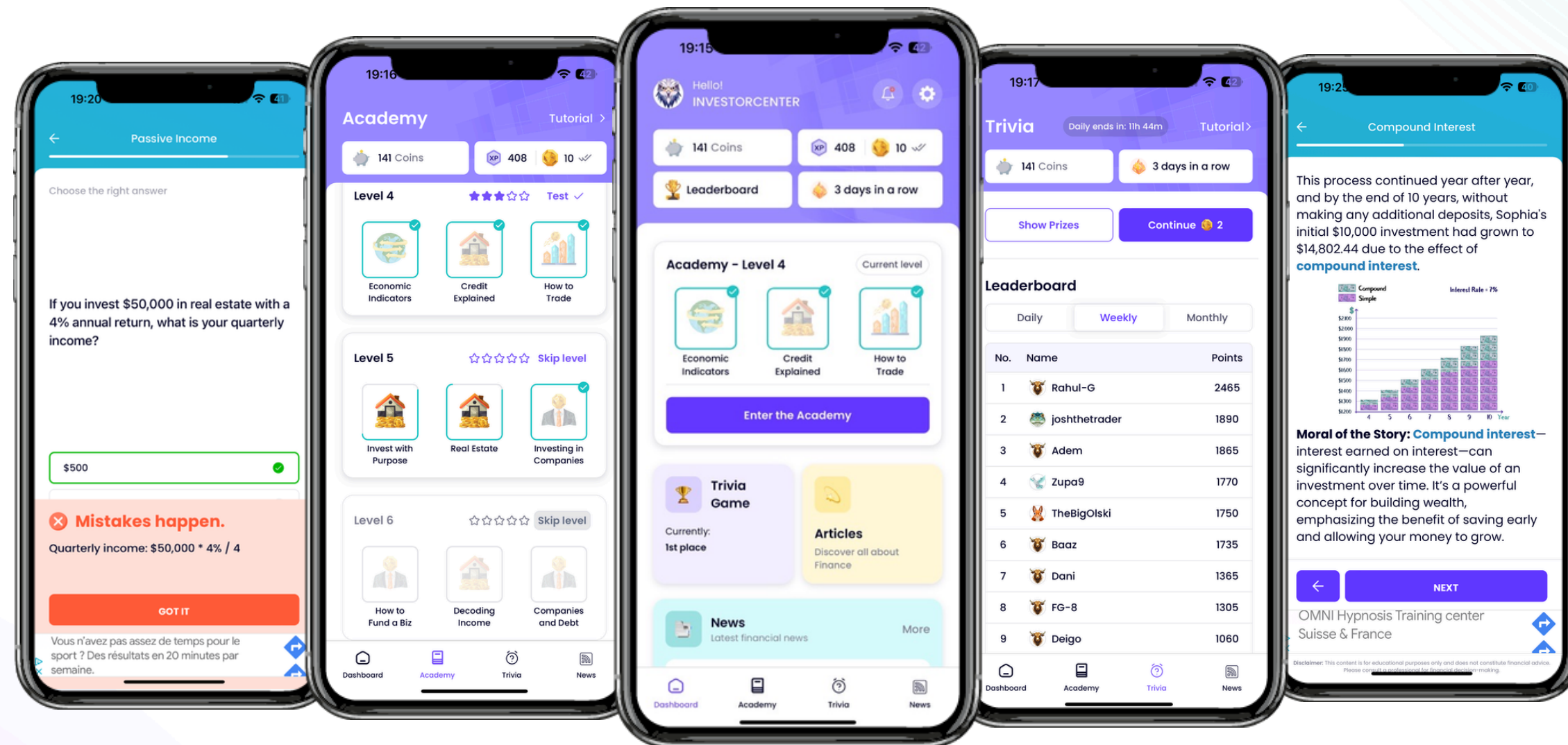
**67% of People are
Financially Illiterate**



Financial Illiteracy by Country



Turn Financial Education into an Scalable Sales Engine



Acquire, qualify, and convert customers through AI-powered gamified learning.

Our Technology, Your Impact

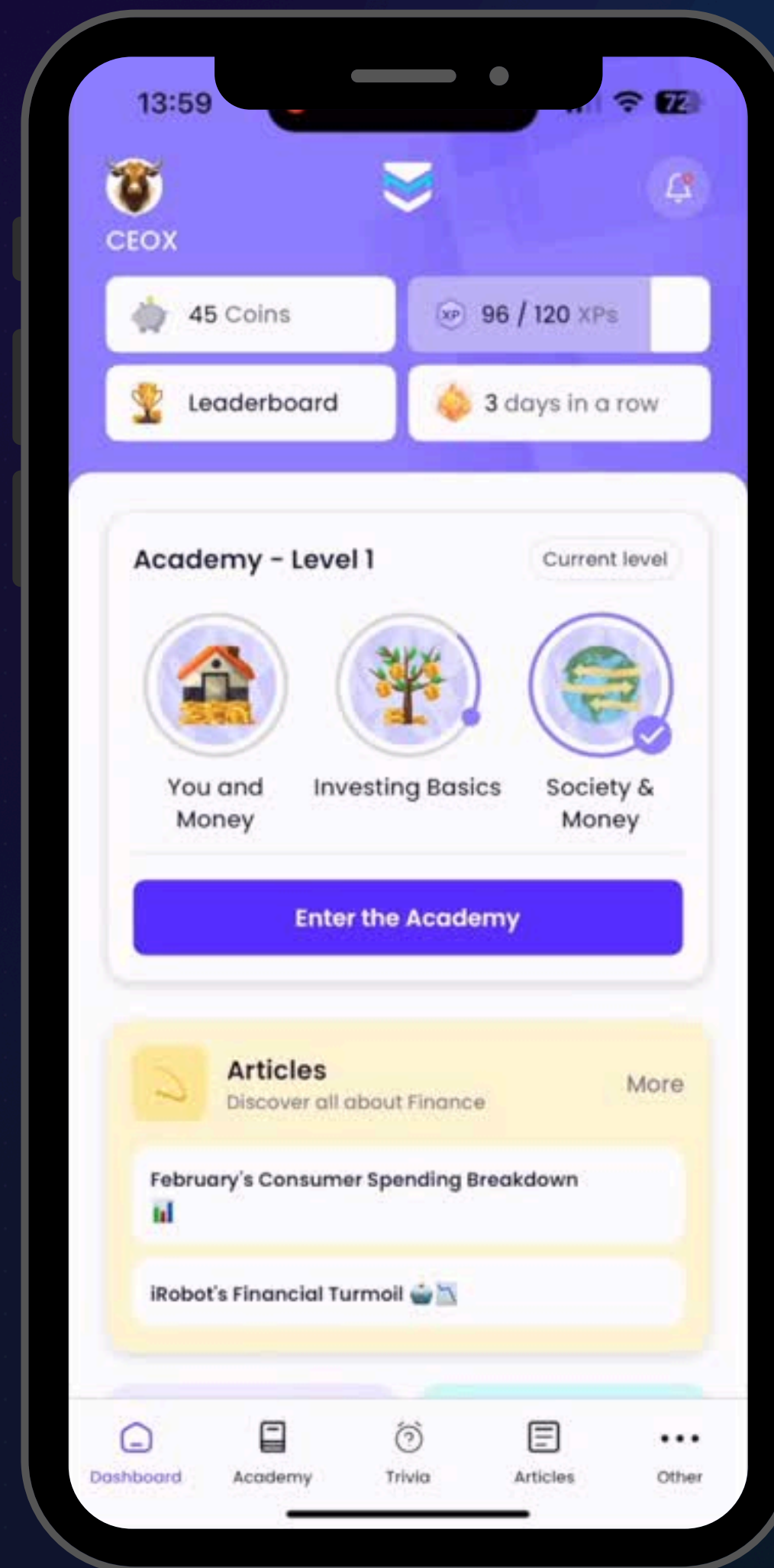
Gamified & Interactive

Bite-Sized Learning

Seamless White-Label

AI-Optimized & Localized

Data-Driven Insights



Turning Learning Into Customer Intelligence

47%

live paycheck to paycheck.

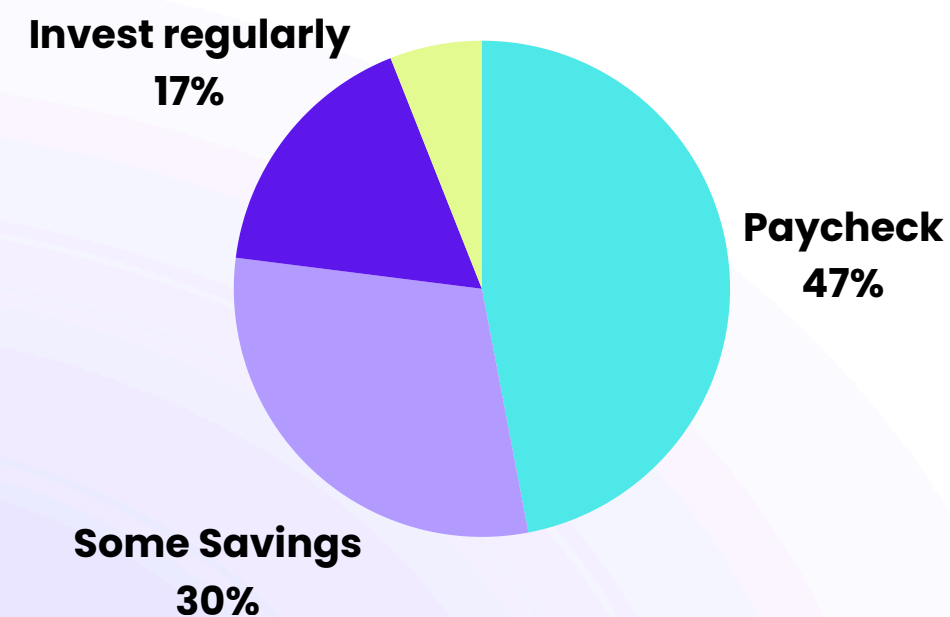
82%

are interested in stocks.

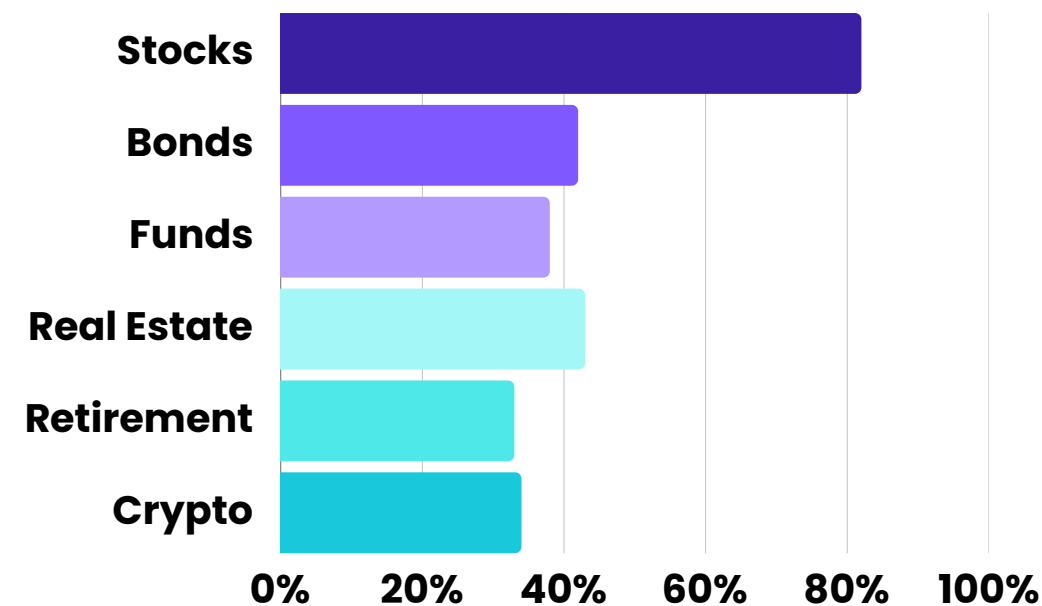
83%

want to invest & grow wealth.

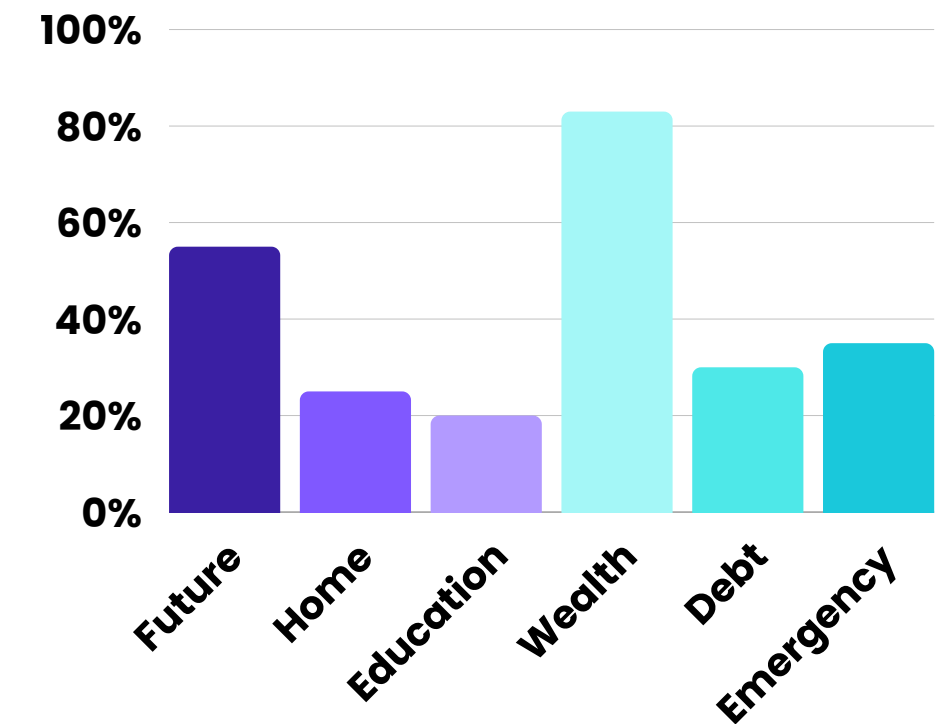
Financial Situation



Asset Interest



Financial Goals



Banks spend millions on market research. We generate it through education.

Turning Learning Into Customer Intelligence

Completed: Intro to ETFs

Module · 12 min · Score 91%

Profiling: Risk Tolerance

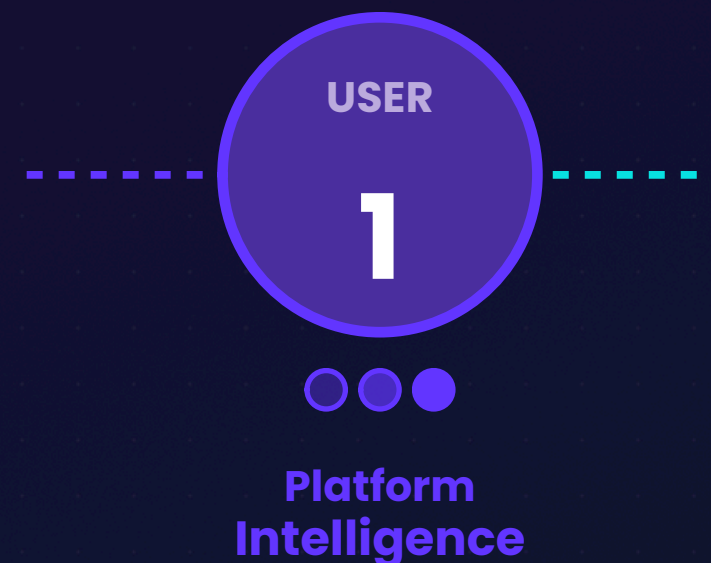
Result → Medium risk profile

Browsed: Investing Basics

3 articles · 8 min engagement

Goal selected: Wealth

Long-term horizon · Age 18–24



USER PROFILE GENERATED

Age bracket **18–24**

Risk appetite **Medium**

Interests **ETFs · Stocks**

Goal **Build Wealth**

Experience **Intermediate**

Every interaction is a signal. Every signal builds the profile. Every profile drives a conversion.

The Future of Financial Discovery



Attract

Gamified education and rewards attract users.



Understand

The platform learns users' goals, needs, and knowledge gaps



Recommend

AI recommends the next learning module



Convert

User adopts the financial products they actually need

Business Model



Fixed Monthly Fee

Maintenance and Support



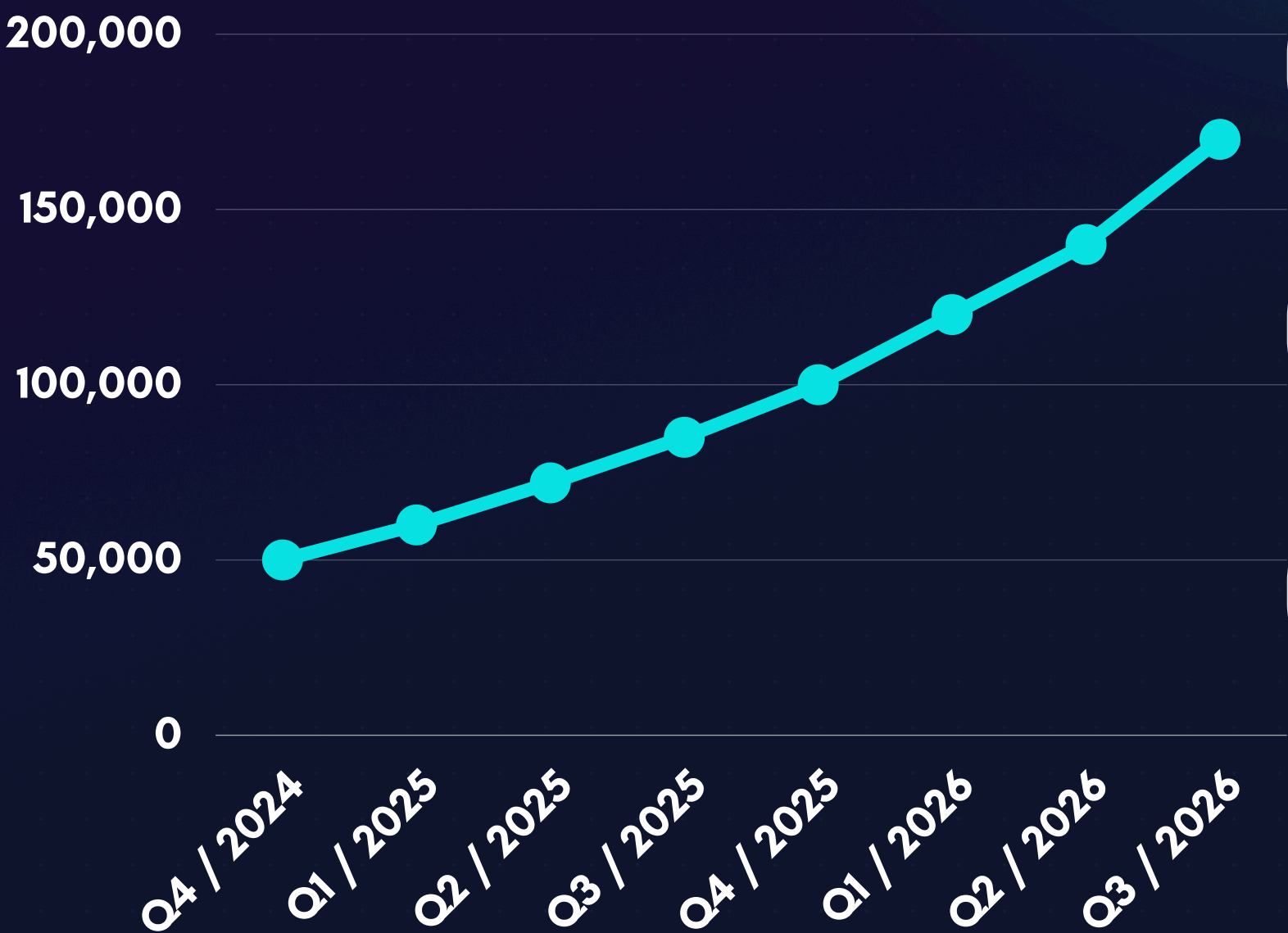
Cost per Lead

Users and Data

Metrics

User Growth

● Users



100K

Registered Users

120K

ARR

3

Markets

Team



David Giron
Chief Executive
Officer

Ex-Venture Capital &
Wealth Management
Previous Founder



Javier Chan
Chief Product
Officer

Ex-Intel
Two-Time EdTech
Founder



7-Person Team

Advisors

Michael Gilmore

ex-UBS, HSBC

Damir Brkic

ex-KPMG, UniCredit

Investors



Rockstart

Partners & Recognitions



The Money Awareness & Inclusion Awards



HUMMELNEST





EFRONTIERS

cutting edge training solutions

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BESTINVER

Spain | Asset Manager | €7B AuM

THE CHALLENGE

Traditional asset managers are continuing to struggle with the rise of do-it-yourself investment platforms, which has translated into extremely high customer acquisition costs and a growing disconnect with younger investors.

Their customer base was ageing and they were failing to connect with investors under 35.

Past education efforts (blogs, podcasts) produced no measurable return and zero data on user intent.

WHY EFRONTIERS

They wanted to turn financial education into a growth engine, not just content. That meant a ready-to-deploy platform with gamification, microlearning, and localized content built in, one that could connect with customers and generate insight from every user.

30,000+

Users Acquired
(Qualified Leads)

90%

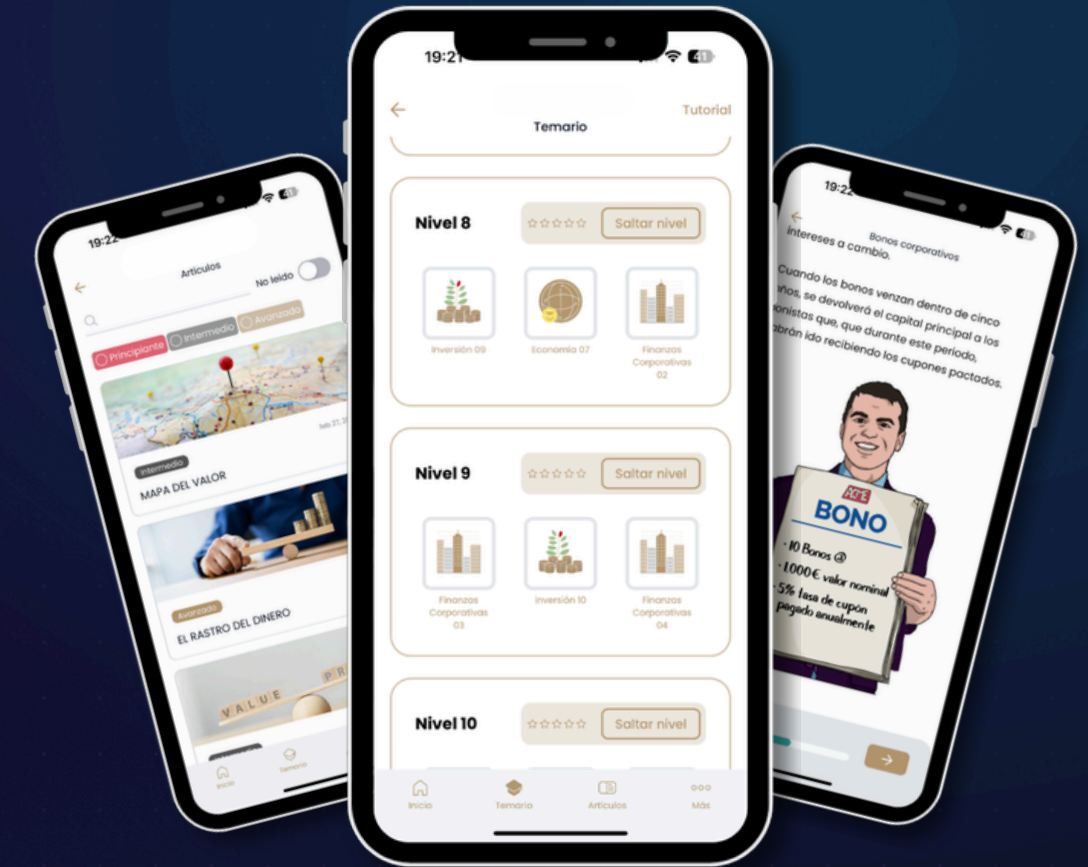
Reduction in
cost per leead

<€4

Avg. Cost per
Lead

80%

Users Aged
18-34



User Age Breakdown

