



PRAKTIKANT

Operative AI for
Independent
Investment Advisors

Advisors Must Make Important Choices



Financial AdvisorTech Solutions Map

140 Financial Planning Vendors

200 Investment Management Vendors

85 Client Engagement Companies

95 Business Development tools

100 Operations/Compliance Platforms

85 Document Management Tools

Over 700 Vendors to choose from!

Independent Advisors pull together vendors to build a customized end-to-end solution that fits their clientele

To operate the build requires people, time and expertise

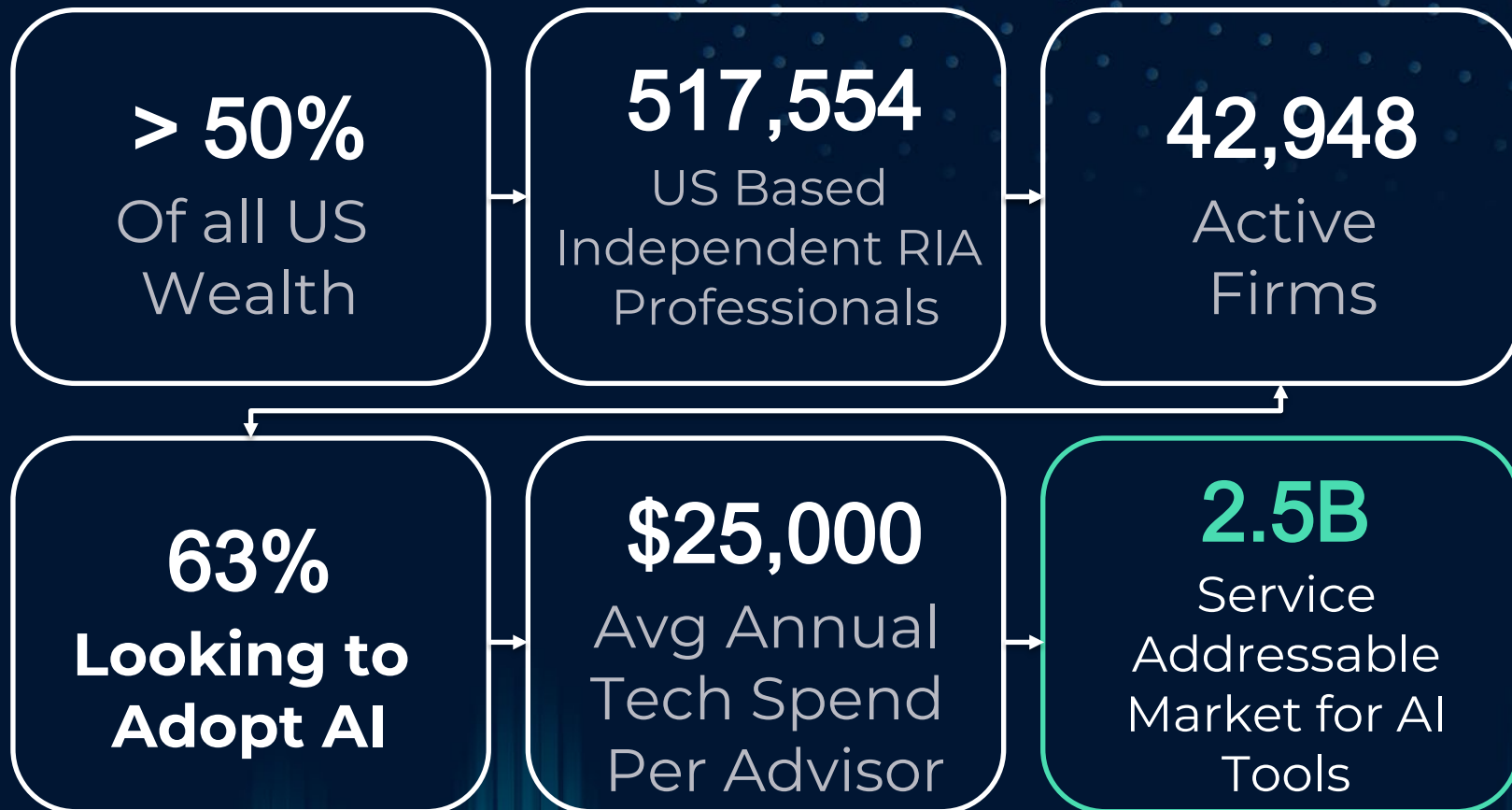
Technology is the 2nd Largest spend for Independents

However...

Advisors still need to allocate **additional people resources** to ensure their tech stack delivers on the service proposition for their clients.

Bad data and poor cross platform integration are the **enemies of scale**.

The Independent RIA Market is growing at >10% per year



Vertical Agents turn Labor into Software

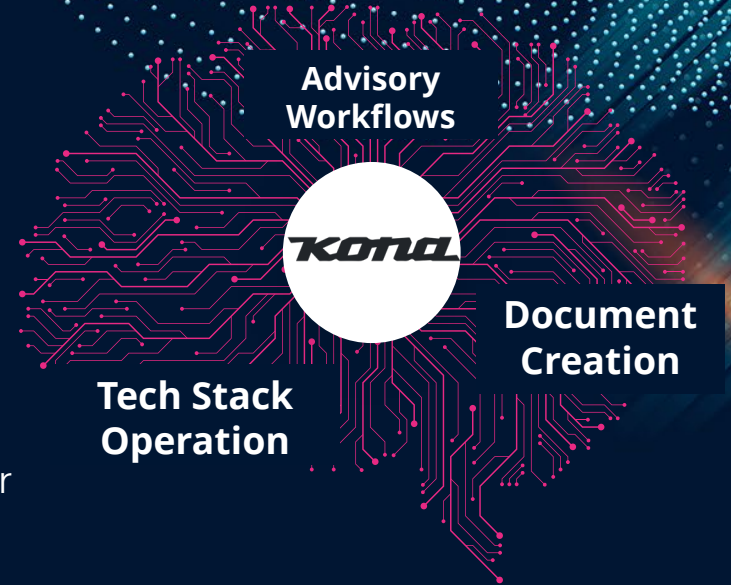
Andreessen Horowitz

- AI is unlocking a new era for vertical SaaS
- Rote tasks and non-strategic roles will be augmented (and in some cases replaced entirely) by AI.
- Margin per customer will increase 2-10x
- Firms will open opportunities in markets previously deemed too small, or not cost efficient to acquire customers.

Praktikant is the Advisors' Silent Partner

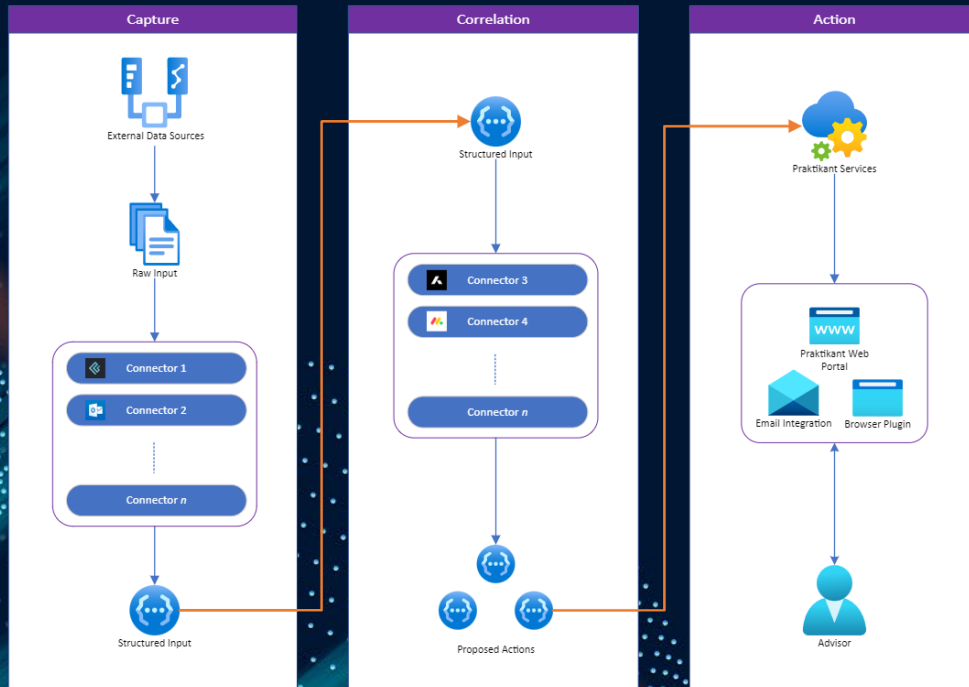
Praktikant:

- Runs on our proprietary “KONA” event engine
- Proactively prepares client deliverables
- Builds and maintains client data
- Becomes the AI Power user unique to each Advisor
- **Example:**
 - *For the Smith Family meeting next week, Prak will update valuations and run the Addepar report, marrying the document with the latest firm research, and log the meeting notes into CRM and task management*

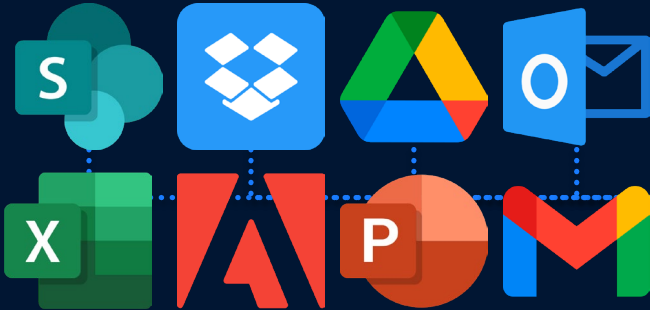


How does Praktikant work?

Praktikant consumes unstructured data through integrations and performs operations for the Advisor to approve, correct or automate



- Inputs
 - Emails
 - Documents (Trusts, Operating Agreements)
 - Meeting Notes
 - Market Commentary
 - Capital Calls
 - Valuation Reports
- Outputs
 - Data Entries (Performance Reporting)
 - Presentations
 - Memorandums
 - Diagrams
 - Due Diligence Memos
 - Agendas



Prak Works like You

Prak “journeys” to each of your vendors, pulling reports, updating data and preparing client deliverables

Context, memory and inference are applied to each advisors’ communications and file repository



Praktikant in Action- Email Companion & Dashboard

Praktikant runs along side each team member, questioning, prompting, preparing, integrating and informing.

Prak is trained on multiple organizational roles



Prak will discover **100-200 insights per day** making sure you don't miss anything important.



Approximately **60% of the insights** will be **vital tasks** that Prak can execute at your direction.



Each task completed utilizing Prak will **save you up to 30 minutes.**

Praktikant Traction & Future KPIs

Current



PAID Pilot 25 Users

Adoption is spreading fast, validating need

100,000 ARR
MVP in Market



Partnerships

Praktikant is a glue that creates additional stickiness for major vendors

SOC 2
Compliance

1Q 2026



Pipeline

250 Users in queue for implementation

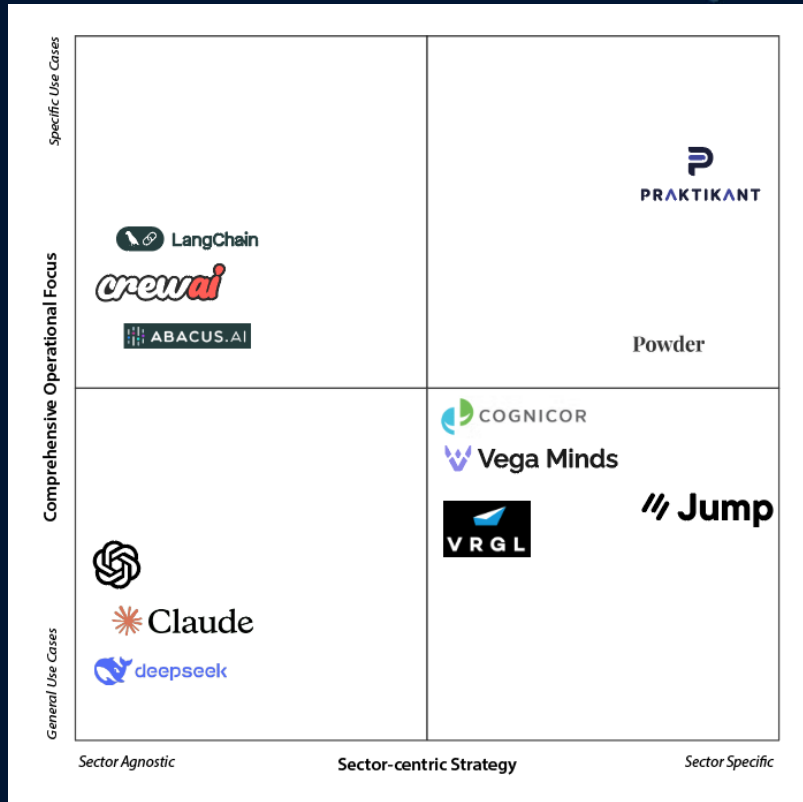
Convert >500k
ARR



Go To Market

With NPS >7, Praktikant is rapidly acquiring new users

Prak has skated to where the puck will be



- Competitors are demonstrating and validating need
- But only provide partial solutions to Prak's comprehensive orchestration
- Praktikant wins by providing unique client-advisor context that works for **both** advisors and operations

Many tools do one job.

Praktikant does all of the jobs,
either on platform or via API, MCP or A2A.

Praktikant Team



William Lane
Founder/CEO

24-years in Financial Services & Board Member Roles



Haig Didizian
Founder/CTO

23 Years in Software Engineering, 15 in C-Suite



Jay Whipple
Head of Design

33 years in Product Management & Product Design Roles



David Soler
Lead Engineer

11 years in Software Development Roles



Jamie Stapf
Founder/COO

32 years in Financial Services



Gurshaman Baweja
Advisor

32 years in Technology Logistics & Software



Praktikant Capital Raise

Praktikant is raising USD 1.25 million to fund:

Advanced Development~70%

- New Integrations can be delivered every 2 weeks
 - Each New Integration unlocks a new customer, each customer has an expected average LTV of >250k
 - Current Pipeline holds 750k in ARR, looking to convert by 2Q 2026
-
- Sales and Marketing Team ~30%

THANK YOU!

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