ASSETLINK

Decision intelligence for the wealth ecosystem

The most important decisions in wealth management still run on spreadsheets.

SERIES A · 2026

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01 · THE PROBLEM

An $84T wealth transfer set off an arms race — and the data underneath it is broken

The same firms are now fighting on three fronts at once — recruiting advisors, distributing product, and acquiring books — and they run all of it on a stitched-together stack that is expensive, fragmented, and blind to intent.

Recruiting

Win advisors before competitors do

Distribution

Reach the right allocators first

M&A

Find wealth practices to acquire

TODAY'S STACK

ZoomInfo

FINTRX

Discovery Data

LinkedIn Sales Navigator

+ enrichment & list tools

$150–200K+

per firm, per year — for static, demographic data with no scoring and no workflow

02 · WHY NOW

Three forces are colliding — and all three favor the intelligence layer

WEALTH IN MOTION

$84T

The largest generational wealth transfer in history is underway.

Every firm is fighting for the advisors who will hold it.

ADVISORS GETTING SCARCE

1 in 3

advisors near retirement while RIA M&A runs at record pace.

Recruiting & M&A are existential — and fought with data.

DATA COMMODITIZING

One query

Advisor records are now an LLM/MCP call away for anyone.

Value migrates from the record to the judgment on top.

Whoever owns the scoring layer when data finishes commoditizing owns the channel.

03 · THE SOLUTION

One intelligence layer. Three revenue motions.

AssetLink unifies and verifies the fragmented advisor universe today. This round productizes the scoring and outreach layer on top — the system that decides, not just displays.

Unify

LIVE TODAY

ADV + FINRA/BrokerCheck + behavioral + social into one resolved identity

→

Score

THIS ROUND

ICP & propensity models — proven concierge in enterprise pilots

→

Act

THIS ROUND

Ranked leads & personalized outreach, delivered in-platform

ONE LAYER SERVES

Distribution | **Recruiting** | **M&A intelligence**

04 · THE PRODUCT

A four-layer engine, not a search box

1	**Data** Resolved advisor identity across regulatory, behavioral & social sources	LIVE
2	**Intelligence** Patented GenAI / RAG / LLM-correlation engine cleans and connects it	LIVE
3	**Signal** Movement, intent & growth signals scored against your ICP	THIS ROUND
4	**Lead Prioritization** A ranked, model-scored worklist delivered where reps already work	THIS ROUND

05 · WHY WE WIN

The incumbent is a directory. We're the decision layer.

INCUMBENTS	ASSETLINK
Tells you who exists — record breadth	One verified identity across every source — live
Demographic + AUM filters, no fit scoring	Patented method claims on the scoring engine
Pre-baked, opaque scores you can't tune	ICP scoring proven concierge in enterprise pilots
Bring-your-own CRM & outreach workflow	Productized ranking & outreach — this round
Volume marketing claim, no accuracy SLA	Accuracy you can put in a contract

> ***"Since I started using AssetLink, I haven't even logged into Discovery Data."*** — pilot participant, June 2026

06 · THE MOAT

Protected IP, in a field where no one else owns any

WHO TO TARGET

Multi-source NLP → intent scoring

Ingests unstructured data across websites, social, filings, and newsfeeds — generating intent and preference features for every advisor profile. Not a search filter. A scored signal.

Claims 1 & 13 · US 12,307,528

WHEN TO ENGAGE

Change detection → who's in motion

Detects temporal shifts in intent signals — knowing not just who an advisor is, but when their behavior indicates they're ready to engage right now. This is the 'in motion' thesis, patented.

Claim 12 · the timing moat

HOW TO ACT

Workflow generation → next-best-action

Converts scoring into structured outreach recommendations — what to say, which sequence to run, personalized at scale. The loop from data to action is the claim.

Claims 4 & 5 · US 12,602,726 & continuations

PATENT PORTFOLIO

2 granted US 12,307,528 · US 12,602,726 · sole inventor Devon Drew · priority Sept 2022 **2 pending** continuations covering GenAI, RAG, behavioral signals & agentic workflow

THE COMPETITIVE GAP

FINTRX, Discovery Data & AdvizorPro hold zero patents on this workflow. The method is owned.

07 · TRACTION

$4.28M in enterprise TCV

~$822K	$3.4M	89%	$880K	+115%
contracted ARR	Principal multi-year TCV	gross margins	MassMutual TCV · in diligence	YoY revenue growth

ENTERPRISE CLIENTS

- **Principal Financial**
- **J.P. Morgan**
- **RFG Advisory**
- **Rothschild Wealth Partners**

IN PILOT & PIPELINE

- **MassMutual** $880K TCV · 3-year · in contract review
- **VettaFi** license & rev-share in negotiation
- **Merrill · Sanctuary · UBS · Dynasty** enterprise sales pipeline
- **Confidential:** IP licensing discussions underway

Land. Embed. Capture the decision.

LAND

Platform subscription

Replaces the $150–200K stack with a verified intelligence feed. Seat-based entry from ~$3.5K/month — fast to land, immediate ROI against dirty incumbent data.

→ expands to $120–160K ACV across firms & their portfolios

EMBED

IP & decision-layer licensing

Embed the scoring engine inside partners' platforms. Each license is pure-margin distribution with no proportional engineering cost. Early proof: VettaFi, Principal, Tradeweb.

→ the layer underneath tools people already use

OUTCOME

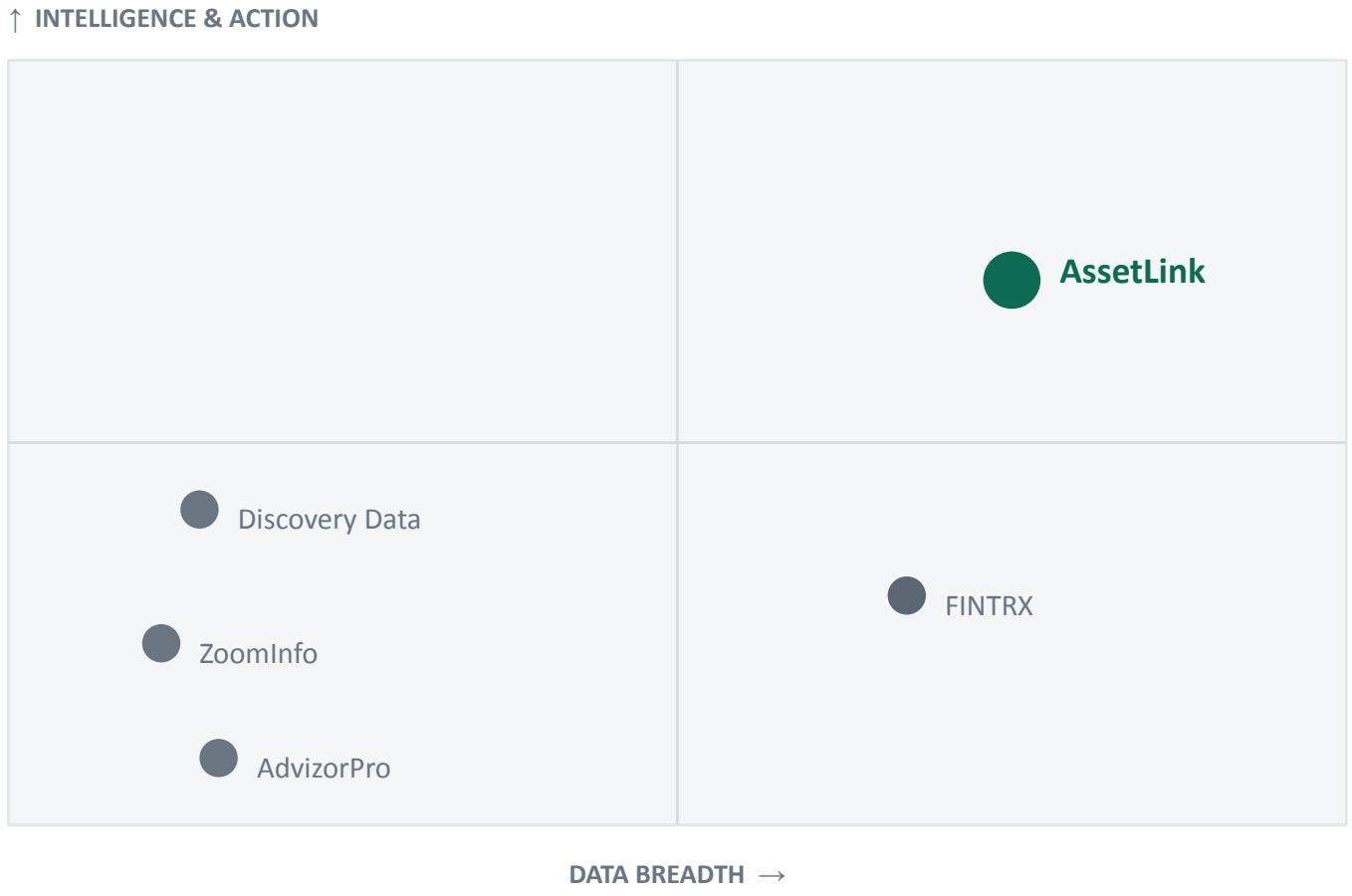
Proximity to the transaction

As the scoring layer gets closer to the decision — sourcing an M&A target, surfacing the right recruit — outcome-based fees tied to the result, not the seat. M&A sourcing fees are the near-term test; recruiting placements are the larger prize.

→ this is the mechanism that prices against the flows

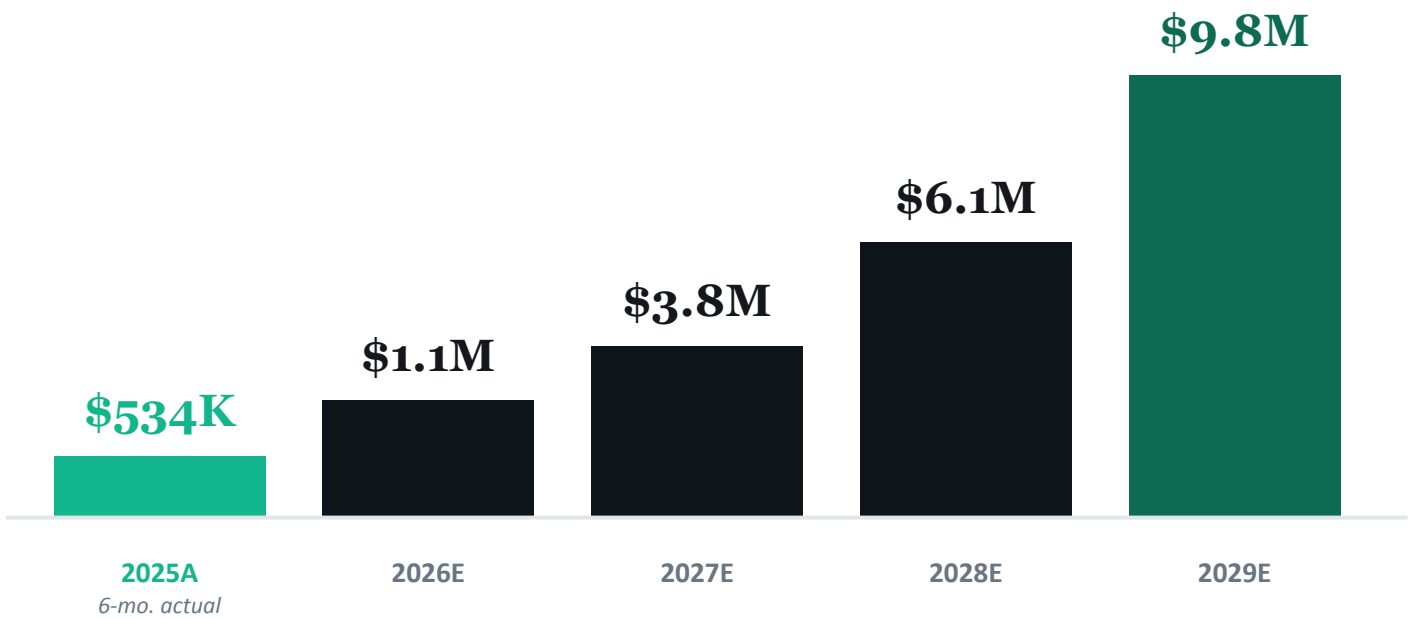
Everyone sells records. We sell decisions.

Incumbents compete on how many records they hold. AssetLink competes on whether the record you're calling is the right one — and what to do next.



A credible path — modeled three ways

2025 ACTUAL REVENUE + BASE CASE ARR ESTIMATES ($M)



2029E SCENARIO RANGE

Bear zero new logos	$5.2M
Base normal pipeline	$9.8M
Bull + Tradeweb / IP	$15.6M

Bull incl. IP: ~$26.6M

89% gross margin

0 Churn

Patented IP

2025A = $534K total recognized revenue (6 months live, Jul–Dec 2025). 2026E–2029E = base case recurring ARR from scenario model.

Raising $10M to convert a working wedge into the channel's decision infrastructure

Ship the scoring system

Productize the patented ICP ranking engine — from concierge to product

Convert IP to licensing

Turn Tradeweb-class interest into signed, recurring license revenue

Land → expand

Grow seat lands into $120–160K ACV platform engagements

Prove the moat

Demonstrate scoring that compounds — tool becomes system of decision

Operators who lived the problem

DD

Devon Drew

Founder & CEO

Leads the vision and sales efforts. Over 15 years living the problem at Vanguard, J.P. Morgan and Merrill Lynch

AH

Andrew Haynes

President & COO

Leads commercial strategy and enterprise partnerships. Spent over 20 years in investment banking. ex Deutsche Bank and RBC

EL

Eric Lealos

Data & ML

Built the data ingestion engine, infrastructure and data models

AD

Arash Dehkordi, PhD

Head of Delivery

Owns enterprise delivery and product management

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Not anymore.

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