Foresight Financial Technologies, Inc.

SAFE Offering

Distribution Structured. AI-Powered Product Velocity Proven. Revenue Activation Next.

Risk Oversight | Compliance Surveillance | Business Intelligence | Client Engagement

Presented by: Aladin Abughazaleh, CEO | June 15, 2026

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What Has Changed Since November 2025?

Two key factors: Distribution is the primary driver. Product expansion is the enabler.

1 Distribution Pathway Now Structured

- Private-label partnership structured with GreenHill (35-year firm) using its existing 4-year reseller relationship with FIS, providing access to ~250,000 addressable accounts at GreenHill, and the global client opportunity through the FIS enterprise distribution channel

2 AI Product Expansion Model Now Proven

- 5 dashboard modules and 2 AI agents built by one domain expert using AI tools. Zero new headcount, proving we can expand the product without scaling the team
- This raise funds go-to-market execution. Product and distribution pathway are already in place

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Initial Distribution Partner: GreenHill + FIS

Foresight (embedded) → GreenHill (private-label partner) → FIS (enterprise distribution) → Wealth managers / advisors / platforms

GreenHill Role

35-year firm in portfolio analytics and reporting. Acts as private-label distributor of Foresight functionality. Handles client-facing packaging, delivery, and support.

FIS Role

One of the largest global financial technology platforms. Multi-year reseller relationship with GreenHill. Provides distribution reach and client access at enterprise scale.

Key Advantage

Foresight enters through a distribution ecosystem that already exists. Avoids restarting enterprise sales, due diligence, and integration cycles. Distribution is not being built. It is being accessed through GreenHill's existing relationship with FIS.

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What is the Product?

A platform-agnostic utility layer spanning four functions

Risk Oversight
Portfolio-level risk identification, scoring, and monitoring

Compliance Surveillance
Automated surveillance of suitability, activity, and regulatory alignment

Business Intelligence
Reporting and analytics for firm, branch, advisor, and client levels

Client Engagement
Client-facing dashboards, meeting prep, and risk conversation support

Foresight Utility Layer
Integrates alongside existing books-and-records, CRM, planning, reporting, and trading systems without requiring platform replacement



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Proof of Capability: AI-Powered Product Velocity

All dashboards and agents are built on the same core data structures and analytics logic. Ready to integrate rapidly.

5 Dashboard Prototypes

- Enterprise Exposure
- Proposal Engine
- RTQ Workflow
- Instrument Analytics
- What-If Analysis

2 Working AI Agents

Risk Detection Agent

Scanned 5+ years of data, found COVID-era patterns human review missed

Data Quality Agent

Audits daily data feeds, catches NULL prices and batch discontinuities automatically

1 Expert Using AI

Small team, large output

All 5 dashboards and both AI agents were built by one domain expert leveraging AI tools

New modules can be built and deployed without incremental headcount, so new features don't require new hires

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Early Validation: Enterprise Relationships

Real deployment, proven enterprise lineage, active commercialization underway

1 Platform Deployment (Live Environment Validation)
Microapps built and delivered within an established advisor platform environment. Functionality exposed to real workflows across multiple firm levels. Proven to work inside existing enterprise systems. (Reference: Appendix II)

2 Enterprise Lineage (Proven Foundation)
Core IP originated from ATA RiskStation, which, pre-COVID, was onboarding its first broker dealer clients and starting co-marketing with Salesforce. Platform rebuilt on modern cloud architecture (AWS and Microsoft Azure, SingleStore storage and compute, API-driven).

3 Active Commercialization (Current)
Private-label partnership with GreenHill in advanced stages, aligned with distribution through GreenHill's existing relationship with FIS. Integration planning and go-to-market timing actively in progress.

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Current Status: Distribution Structured, Product Ready

Distribution structured. Product ready. Execution underway.

1 Product
Core platform built and operating on production-sourced data. 5 dashboard protypes and 2 AI agents completed and tested. API-driven, modular architecture.

2 Distribution
GreenHill will act a as private-label partner, with distribution through its own sales team and existing relationship with FIS. Foresight embeds inside GreenHill's platform on a private label basis. GreenHill distributes through FIS and additional partners over time.

3 Execution Phase
Integration planning underway with GreenHill. Initial deployment sequencing defined. Economics agreed across all parties. Already demonstrated via live microapps deployed in an advisor platform.

4 Near-Term Milestones
Complete partner integration (3 months from funding). Deploy initial client instances (6 months from funding). Activate first revenue through partner channel (9 months from funding). Milestone timing is estimated based on current information.

5 Capital Purpose
Current financing supports commercialization and scale, not initial product creation. Revenue activation is the next phase. Foresight will also invest in additional go to market activity to secure additional distribution partners globally.

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Regulatory Pressure Increases Market Need

Compliance expectations shifting from periodic review to provable, ongoing supervision

1 What Regulators Expect
Firms must demonstrate portfolios are aligned with client risk tolerance and with clients' best interest. Supervision must be ongoing and reliably cover all accounts and advisors.

2 Where Firms Struggle
Risk and suitability are evaluated in fragmented systems. Oversight is manual, periodic, and reactive. Little to no automation of audit evidence.

3 Resulting Exposure
Increased exam risk. Operational burden on compliance teams. Friction with advisors who want to focus on current clients and close prospects. Difficulty scaling oversight as firms grow.

4 Foresight Role
Turns regulatory requirements into automated workflows - continuous risk monitoring, suitability checks, and audit evidence built into the advisor's existing environment. Advisors spend less time on compliance and more time with clients.

5 Target Segment
RIAs and broker-dealers within the partner distribution ecosystem. Foresight enters through pre-approved channel, no new vendor onboarding. Foresight would provide Tier 2 support escalation to GreenHill customer success teams.

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Revenue Model w/ Initial Distribution Partner

Foresight base price: $3/acct/yr | Distributor markup: $2/acct | Partner markup: $1/acct | End-client: $6/acct/yr | ~250K portfolios addressable via partner channel

Adoption	Accounts	Foresight ($3/acct)	Distributor ($2/acct)	Partner ($1/acct)	Total Value Chain	End-Client $/Acct/Yr
25%	62,500	**$187,500**	$125,000	$62,500	**$375,000**	**$6.00**
50%	125,000	**$375,000**	$250,000	$125,000	**$750,000**	**$6.00**
75%	187,500	**$562,500**	$375,000	$187,500	**$1,125,000**	**$6.00**
100%	250,000	**$750,000**	$500,000	$250,000	**$1,500,000**	**$6.00**

$750K
Foresight ARR at Full Adoption

$1.5M
Total Value Chain at Full Adoption

$6/acct/yr
Significantly Below Competitors

Foresight revenue is generated through GreenHill's distribution, including accounts accessed via FIS channels where GreenHill is the contracted provider. Initial deployments expected following partner integration.

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History / Key Milestones

Summer 2023

Completed convertible note in June 2023 and acquired ATA RiskStation, LLC IP in July 2023. Refactored acquired IP to leverage new storage, compute and authentication technologies.

December 2024

Executed strategic distribution agreement with two large go-to-market partners. Received funding commitment to complete updates to the user interface.

January – March 2025

Built and deployed microapps for major industry conference. Began updating user interface with India-based development team.

Since March 2025

Attended and exhibited at industry conferences. Completed proof of concept with additional platforms. Began executing against a pipeline of new prospects.

Q4 2025 – Q1 2026

Structured private-label partnership with GreenHill, aligned with its existing reseller relationship with FIS. Built 5 new dashboard prototypes and 2 AI agents with zero new staff.

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Use of Proceeds

$2M SAFE - Execution Financing

Working Capital
$1,250,000

Maintain operational runway during initial revenue ramp

Enterprise Integration
$100,000

Complete integration with strategic partner's platform, dedicated consultant and infrastructure

Revenue-Tied Hiring
$250,000

Selective hires tied to revenue generation and partner channel activation

Platform Extension
$200,000

Extend current platform capabilities through AI-enabled development and production hardening

Channel Activation
$200,000

Launch go-to-market with GreenHill, support enterprise sales, attend industry events

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SAFE Offering

Seed Offering Size

Up to $2 Million USD

SAFE Investment

$10 Million post-money valuation cap (example: $500K = 5%)

Accredited Investors Only

Private placement per federal and state securities laws

Click here to

Review and Execute SAFE Agreement

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Next Steps

1

Execute NDA

Review and sign NDA to receive confidential information during additional investor due diligence. You can access and execute NDA at this link

2

Live Product Demo

See the production-ready Foresight platform including the new 5 dashboard modules, AI risk agents, and the partner integration path.

3

Additional Investor Due Diligence Questions

Upon NDA execution, Foresight will address additional questions and GreenHill leadership can be made available for a call to discuss the distribution strategy and partnership structure.

4

Review SAFE & Invest

Click here to review the SAFE agreement ($10M post-money cap). Minimum investment of $200K. Funds go toward completing integration, launching distribution, and supporting early growth.

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Foresight Financial Technologies

Distribution Structured. AI-Powered Product Velocity Proven.

Not acquiring a product. Acquiring a capability.
Foresight scales intelligence, not headcount.

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Appendix I

Competitive Summary & Projections

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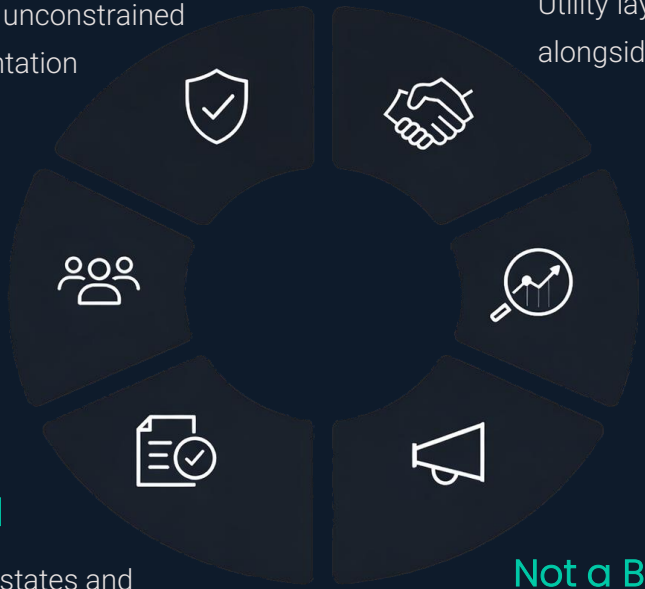
How is Foresight Different?

Highly Curated

Built for non-quants. No unconstrained user scenario experimentation

Built for Partnering

Utility layer architecture designed to integrate alongside existing firm operating environments



Whole Enterprise Focused

Customized reporting & workflows for different enterprise user roles

Potential New Profit Center

Firms, or their providers, can add value in new ways, to create new revenues

Automated Audit Trail

Audit trail for portfolio risk states and user activity, built as a by-product of use

Not a Black Box

Highly transparent analytics using mainstream risk modelling logic

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Competitive Matrix

Enterprise Functionality	Foresight	Nitrogen	Andes Wealth	Orion	Tiffin	MStar
Relative Risk Scoring	✓	✓	✓	✓	✓	✓
Portfolio risk vs tolerance	✓	✓	✓	✓	✓	✓
Stress testing of portfolio	✓	✓	✓	✓	✓	✓
Advisor compliance dashboard	✓	✓			✓	✓
Enterprise compliance dashboard	✓					
Audit Trail - Daily historical risk	✓					
Audit Trail - User activity logging	✓	✓		✓		
Multi-Level BI reporting	✓					
Portfolio "what-if" allocation	✓	✓	✓		✓	✓
Managed instance multi-cloud	✓					
Easily embeddable widget	✓					
Client meeting mode w/ audit trail	✓	✓		✓		
Custom risk scenarios	✓	✓		✓		✓
Part of unified advisor system	✓			✓	✓	✓

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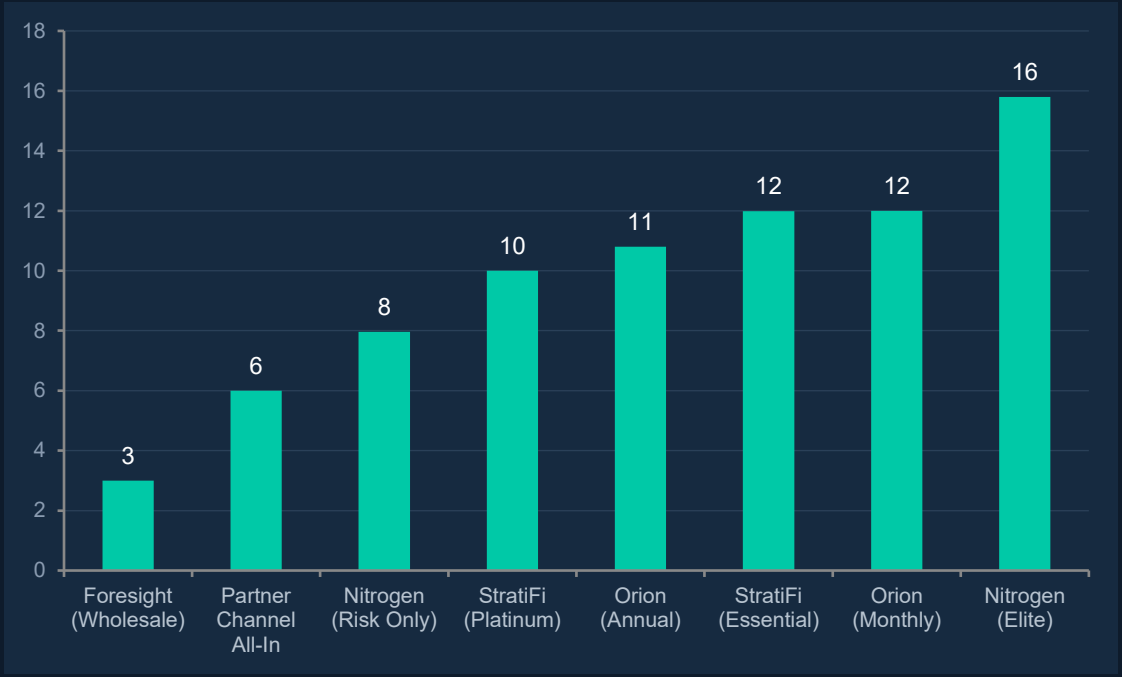
Competitive Pricing - Methodology

Conversion Formula: 1 Advisor = 125 Households × 2.2 Accounts/Household = 275 Accounts per Advisor | Price advantage enabled by architecture: no per-user constraints, automated workflows, audit trail as byproduct

Competitor	Pricing Model	Published Price	Account Cap / Fair Use	Conversion Math	Per Acct /Year
Nitrogen (Risk Center)	Per registered staff (advisor)	$199/mo (Risk Center) $395/mo (Elite bundle)	Fair use policy: ~300 accts/advisor; 150 clients for Asset Sync	$199×12 = $2,388/yr ÷ 300 accts = $7.96 $395×12 = $4,740/yr ÷ 300 accts = $15.80	**$7.96 to $15.80**
Orion Risk Intelligence	Per user/mo; standalone or Advantage Stack	$275/mo (standalone) $247.50/mo (annual billing)	No explicit account cap; per-user pricing	$275×12 = $3,300/yr ÷ 275 accts = $12.00 $247.50×12 = $2,970/yr ÷ 275 accts = $10.80	**$10.80 to $12.00**
StratiFi (PRISM)	Per firm/yr; explicit acct cap with overages	Essential: $5,995/yr Premium: $16,995/yr Platinum: $39,995/yr	Essential: 500 acct cap Premium: 1,500 acct cap Platinum: 4,000 acct cap	$5,995 ÷ 500 accts = $11.99/acct $16,995 ÷ 1,500 = $11.33/acct $39,995 ÷ 4,000 = $10.00/acct	**$10.00 to $11.99**
Foresight (via Partner Channel)	Per account/yr; no cap; linear scaling	$3/acct wholesale + $2 distributor + $1 partner	No account cap; no fair use limit; price scales linearly	$3 + $2 + $1 = $6/acct/yr all-in to end client	**$6.00**

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Markup Headroom Analysis



Key Takeaways

- **Foresight wholesale: $3.00/acct**
- **Partner channel all-in: $6.00/acct**
- Undercuts Nitrogen Risk by 25%
- Undercuts Nitrogen Elite by 62%
- Undercuts Orion by 44–50%
- Undercuts StratiFi by 40–50%
- Significant margin headroom for distribution partners

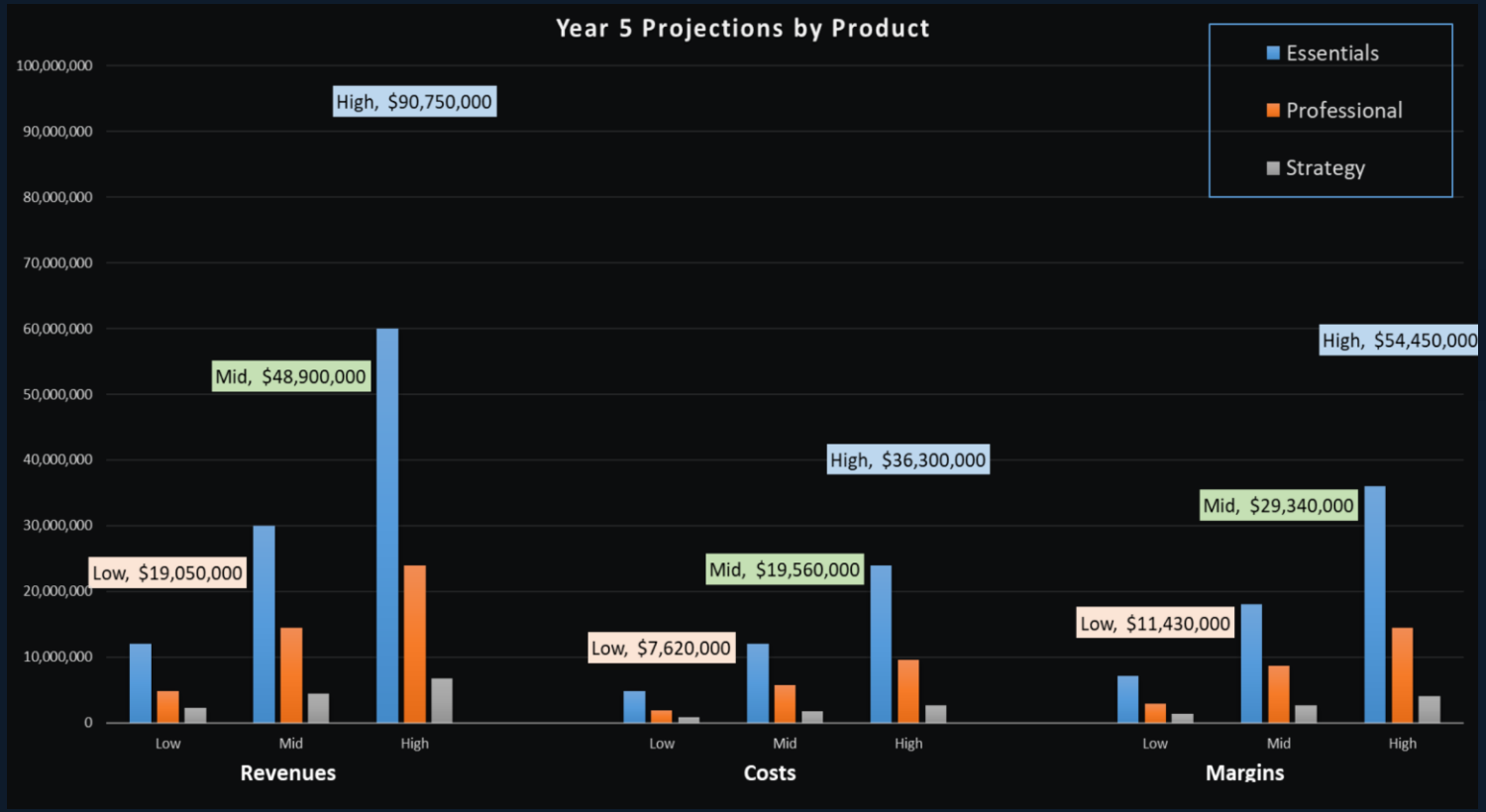
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Projections by Product - Year 5

Products		Essentials	Professional	Strategy	
Monthly Unit Price ($)		0.50	400	75	
Units	Low	2,000,000	1,000	2,500	
	Mid	5,000,000	3,000	5,000	
	High	10,000,000	5,000	7,500	
		Essentials	Professional	Strategy	Total
Revenues	Low	12,000,000	4,800,000	2,250,000	$ 19,050,000
	Mid	30,000,000	14,400,000	4,500,000	$ 48,900,000
	High	60,000,000	24,000,000	6,750,000	$ 90,750,000
Costs	Low	4,800,000	1,920,000	900,000	$ 7,620,000
	Mid	12,000,000	5,760,000	1,800,000	$ 19,560,000
	High	24,000,000	9,600,000	2,700,000	$ 36,300,000
Margins	Low	7,200,000	2,880,000	1,350,000	$ 11,430,000
	Mid	18,000,000	8,640,000	2,700,000	$ 29,340,000
	High	36,000,000	14,400,000	4,050,000	$ 54,450,000

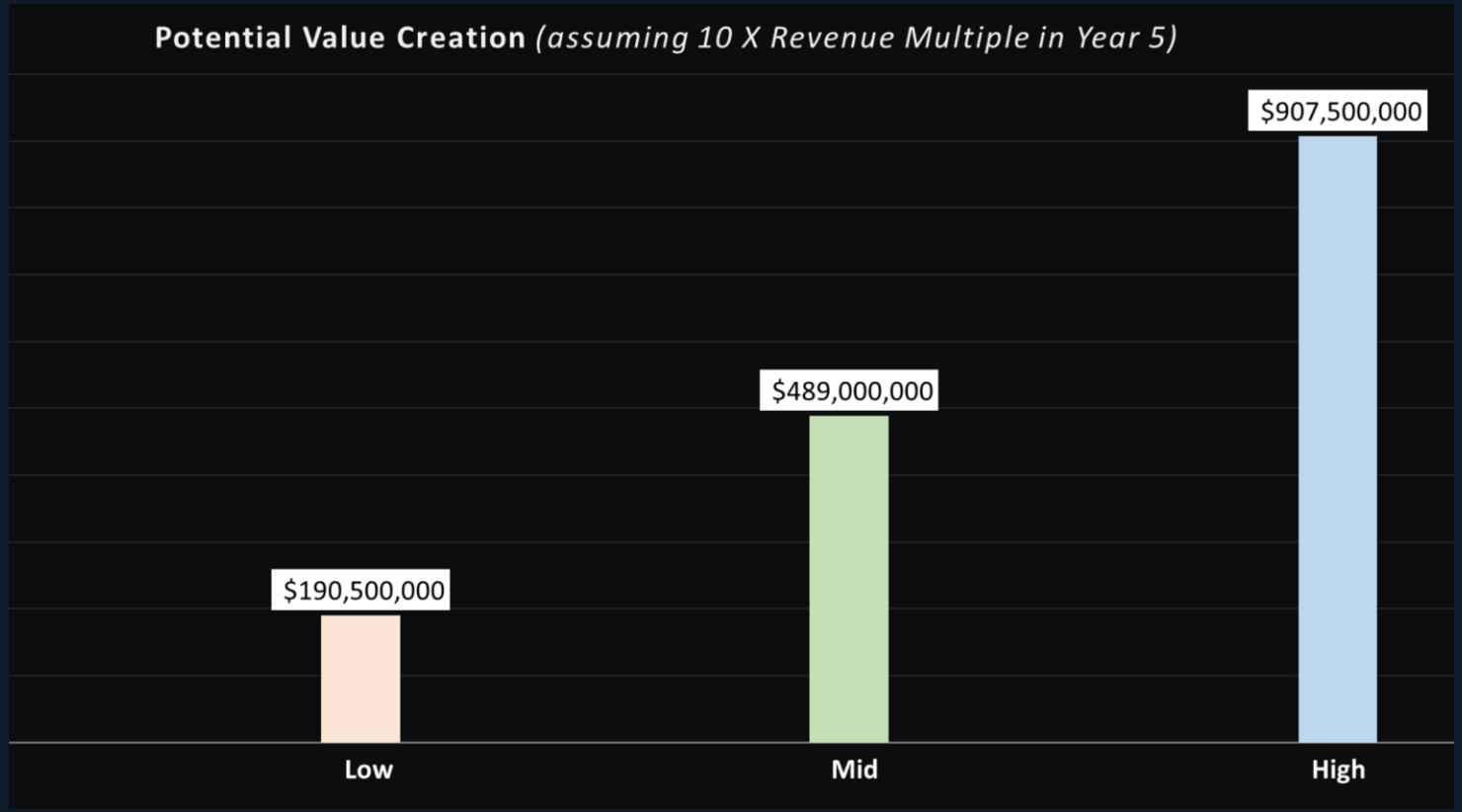
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Economic Scenarios



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Opportunity Size



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5-Year Growth Plan

Annual Recurring Revenue (ARR)

- Low-Case: $19 Million
- Mid-Case: $49 Million
- High-Case: $91 Million

Operating Margins

- 60% at Scale

Investment Opportunity

- Early entry point: $2M allocation
- Participation in Foresight monetizing ready product, technology and distribution relationships

Key Assumptions

- 5,000 – 10,000 advisors by Year 5
- 5-10 million end-client portfolios

Cash-Efficient Growth

- Signed distribution partners
- Product in-market
- Working capital for rapid scaling

Enterprise Value Potential

- Low-Case: $190 Million (10x Revenue)
- Mid-Case: $489 Million
- High-Case: $907 Million

Why Foresight

- Rising compliance demands create urgent need
- First-mover in integrated Risk+ compliance + BI in a highly fragmented global market
- Unlocks new revenue streams for clients

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Risk Factors

Investing in the Company involves a high degree of risk. You should consider and carefully read all of the risks and uncertainties described below, as well as other information contained in this summary and any additional information or clarifications you request from the Company before making an investment decision. The risks described below are not the only ones facing the Company. The occurrence of any of the following risks or additional risks and uncertainties not presently known to us could materially and adversely affect the Company's business, financial condition, results of operations or cash flows. In any such case, the value of your investment could decline, and you may lose all or part of your investment. This summary also contains forward-looking statements and estimates that involve risks and uncertainties. The actual results of the Company could differ materially from those anticipated in the forward-looking statements as a result of specific factors, including the risks and uncertainties described below.

- Risks Associated with an Investment in the Company: The Company has no operating results to date. Therefore, the Company's ability to commence operations is dependent upon obtaining financing through this Simple Agreement for Future Equity ("SAFE") offering. Since we do not have an operating history, you will have no basis upon which to evaluate our ability to achieve the Company's business objectives.
- Control by the Founder; Conflicts of Interest: The Founder and CEO, Aladin Abughazaleh, will continue to own shares that represent a voting majority. In considering the risks and merits of an investment in the Company, interested investors should carefully consider the potential conflicts of interest involving the relationships between management, the Founder and the Company, including the compensation arrangements for management and others.
- Risks Related to Operations: There can be no assurances that the Company's operations will become or remain profitable. The Company faces numerous risks and uncertainties. Some of these risks relate to the Company's ability to attract clients; implement its sales and marketing initiatives; attract, retain, and motivate qualified personnel; respond to actions taken by its competitors; and build an infrastructure to effectively manage the Company's growth.
- Risks Associated with Brand Awareness: The future success of the Company will depend, in part, on the Company's ability to increase its brand awareness and name recognition of its products. To build up brand awareness, the Company must succeed in its marketing efforts and continue to provide high quality services to its client base.
- Risks Associated with Key Personnel: The Company's success will be dependent to a significant degree upon the skills, experience and efforts of its key personnel. It would be difficult for the Company to find adequate replacements for those key individuals. The Company intends to hire additional key personnel such as a Chief Revenue Officer, Senior Developer/Architect, Customer Support personnel and an Analyst. The loss of the services of one or more of our key personnel could have a negative effect on the Company's business, results of operations and future growth. No assurance can be given that the Company will be able to attract or retain such key personnel.
- No Distributions: There can be no assurances that the Company's proposed operations will result in sufficient revenues to enable profitable operations or to generate positive cash flow. For the foreseeable future, the Company anticipates using any revenues to finance the growth of the Company and service its liabilities and does not anticipate the ability to make distributions to the Company's investors in the short term.
- Dilution; Ability to Raise Additional Capital: The Company may in the future raise additional capital by the issuance of additional shares. All SAFE holders and shareholders at such time will incur a dilution in the book value of their holdings. The percentage interest of all holders will be reduced pro-rata as additional shares may be issued by the Company from time to time. No assurance can be given, however, that the Company will be able to raise sufficient capital to carry out the Company's business strategy.
- Restriction on Transferability: The Company's shares have not been and will not be registered under the Securities Act of 1933, as amended, or any applicable state securities laws and may not be sold or transferred without compliance with the registration or qualification provisions of applicable federal and state securities laws or applicable exemptions there from, the availability of which depends in part upon the investment intent of interested investors.
- No Public Trading Market: There is no established trading market for the Company's shares, and it is anticipated that no trading market for the purchase and sale of the Company's shares will develop in the foreseeable future. Consequently, SAFE holders and shareholders may not be able to sell or otherwise dispose of their holdings and will be required to hold their interests in the Company for an indefinite time period.
- Tax Risks: There may be tax risks associated with the purchase, holding and disposition of interests in the Company, some of which may be specific to an investor's own tax situation. Prospective investors are strongly urged to consult their own qualified tax or financial advisors with regard to the complex federal (as well as state and local) tax consequences involved. The Company has not requested and will not request a ruling from the Internal Revenue Service with respect to any of the federal income tax matters discussed herein and there can be no assurances that a favorable ruling would be issued, if requested.
- Risks Associated with Development of Technology: Evolving Technologies: The Company will operate in a market, which is characterized by rapidly changing technologies, evolving industry standards and evolving customer demands. Technology may be subject to rapid obsolescence. It is possible that competitors could engineer and market products, which could compete with the Company's products. The Company's future success will depend on its ability to adapt to rapidly changing technologies and industry standards and to continually improve the performance, features and reliability of its services.
- Dependencies on Computer Systems: The Company's operations are dependent on its ability to protect its computer systems against damage from computer viruses, fire, power loss, telecommunications failure, malicious attacks and other similar unexpected adverse events. Despite the precautions the Company has taken, unanticipated problems affecting the Company's computer systems could cause delays and interruptions in the delivery of services, which may or may not be adequately covered by insurance.

Appendix II

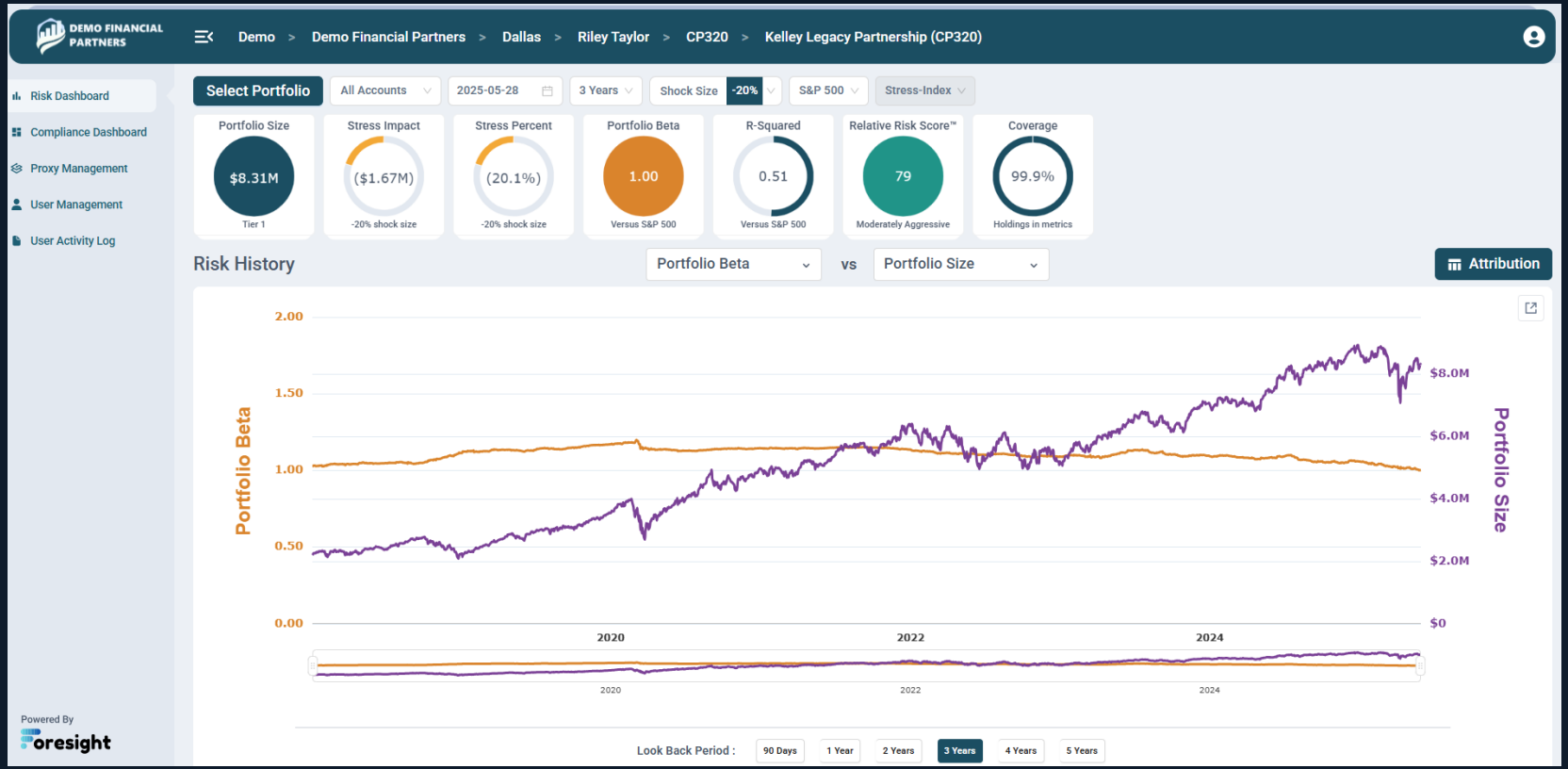
Product User Interface Screenshot Samples

Click here to watch a 90-second video preview

(you may need to unmute and move the slider to the beginning after opening video)

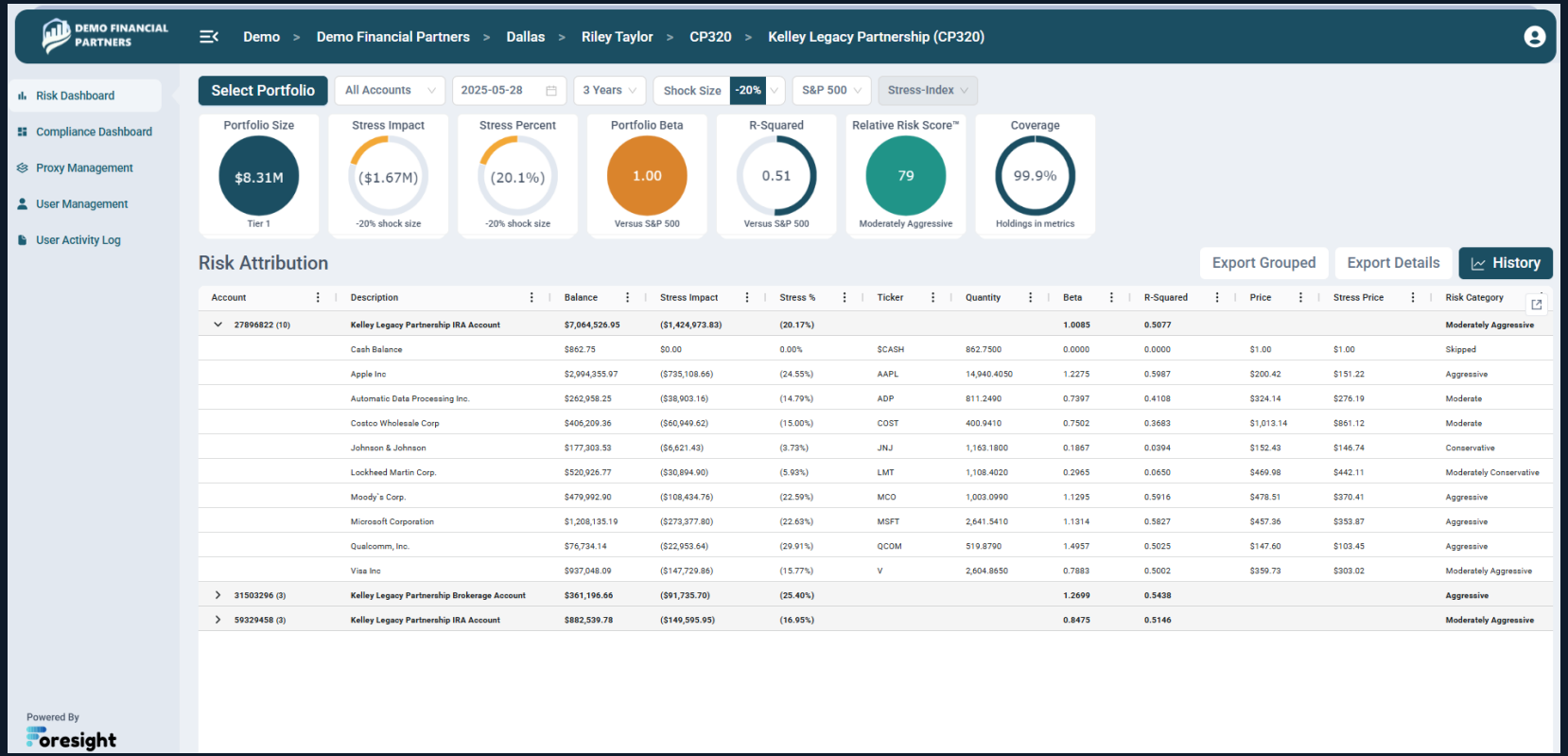
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Portfolio Risk Dashboard – Advisor/Client



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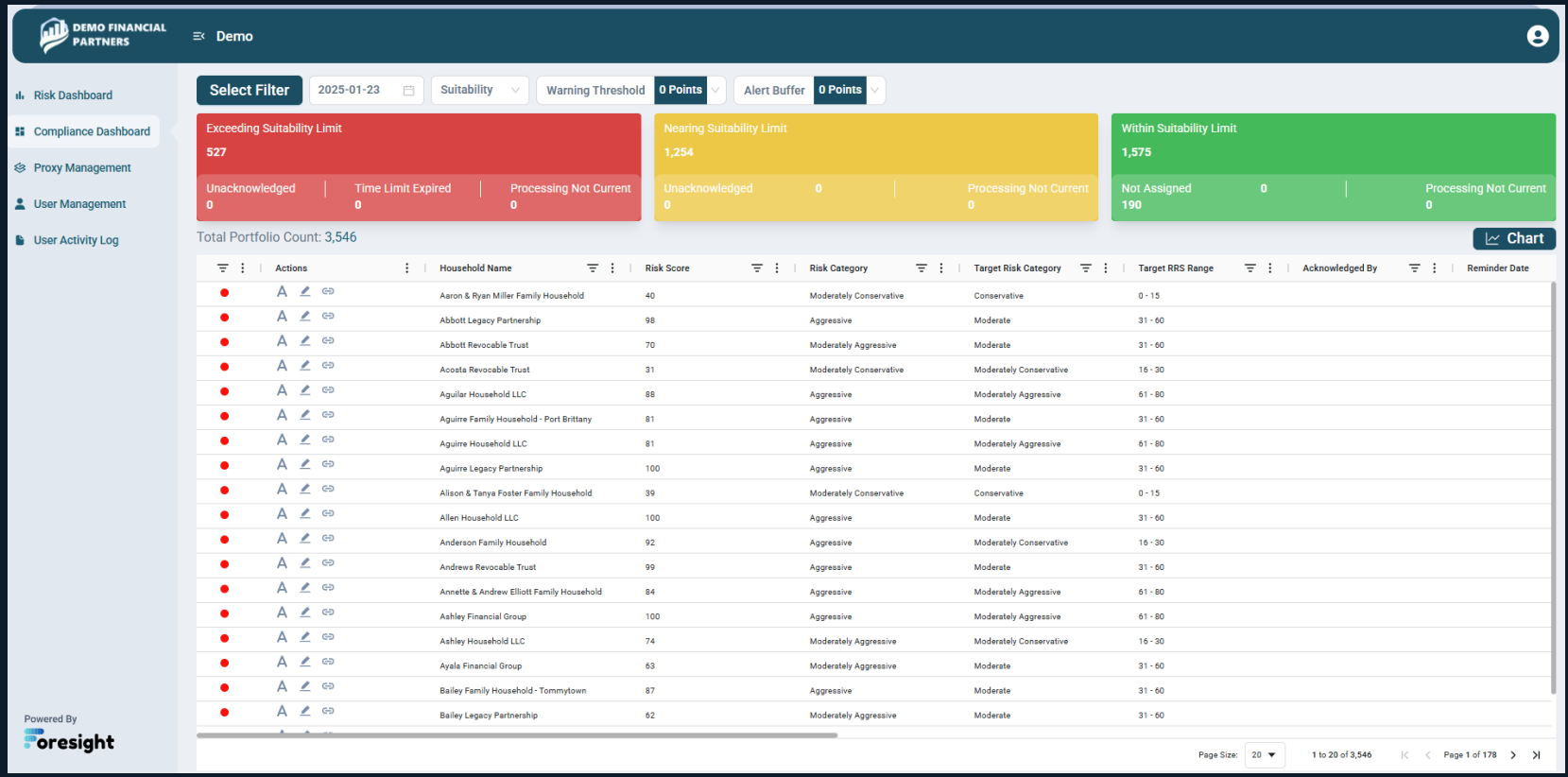
Portfolio Risk Dashboard – Risk Attribution



Account	Description	Balance	Stress Impact	Stress %	Ticker	Quantity	Beta	R-Squared	Price	Stress Price	Risk Category
27896822 (10)	**Kelley Legacy Partnership IRA Account**	**$7,064,526.95**	**($1,424,973.83)**	**(20.17%)**			**1.0085**	**0.5077**			**Moderately Aggressive**
	Cash Balance	$862.75	$0.00	0.00%	$CASH	862.7500	0.0000	0.0000	$1.00	$1.00	Skipped
	Apple Inc	$2,994,355.97	($735,108.66)	(24.55%)	AAPL	14,940.4050	1.2275	0.5987	$200.42	$151.22	Aggressive
	Automatic Data Processing Inc.	$262,958.25	($38,903.16)	(14.79%)	ADP	811.2490	0.7397	0.4108	$324.14	$276.19	Moderate
	Costco Wholesale Corp	$406,209.36	($60,949.62)	(15.00%)	COST	400.9410	0.7502	0.3683	$1,013.14	$861.12	Moderate
	Johnson & Johnson	$177,303.53	($6,621.43)	(3.73%)	JNJ	1,163.1800	0.1867	0.0394	$152.43	$146.74	Conservative
	Lockheed Martin Corp.	$520,926.77	($30,894.90)	(5.93%)	LMT	1,108.4020	0.2965	0.0650	$469.98	$442.11	Moderately Conservative
	Moody`s Corp.	$479,992.90	($108,434.76)	(22.59%)	MCO	1,003.0990	1.1295	0.5916	$478.51	$370.41	Aggressive
	Microsoft Corporation	$1,208,135.19	($273,377.80)	(22.63%)	MSFT	2,641.5410	1.1314	0.5827	$457.36	$353.87	Aggressive
	Qualcomm, Inc.	$76,734.14	($22,953.64)	(29.91%)	QCOM	519.8790	1.4957	0.5025	$147.60	$103.45	Aggressive
	Visa Inc	$937,048.09	($147,729.86)	(15.77%)	V	2,604.8650	0.7883	0.5002	$359.73	$303.02	Moderately Aggressive
31503296 (3)	**Kelley Legacy Partnership Brokerage Account**	**$361,196.66**	**($91,735.70)**	**(25.40%)**			**1.2699**	**0.5438**			**Aggressive**
59329458 (3)	**Kelley Legacy Partnership IRA Account**	**$882,539.78**	**($149,595.95)**	**(16.95%)**			**0.8475**	**0.5146**			**Moderately Aggressive**

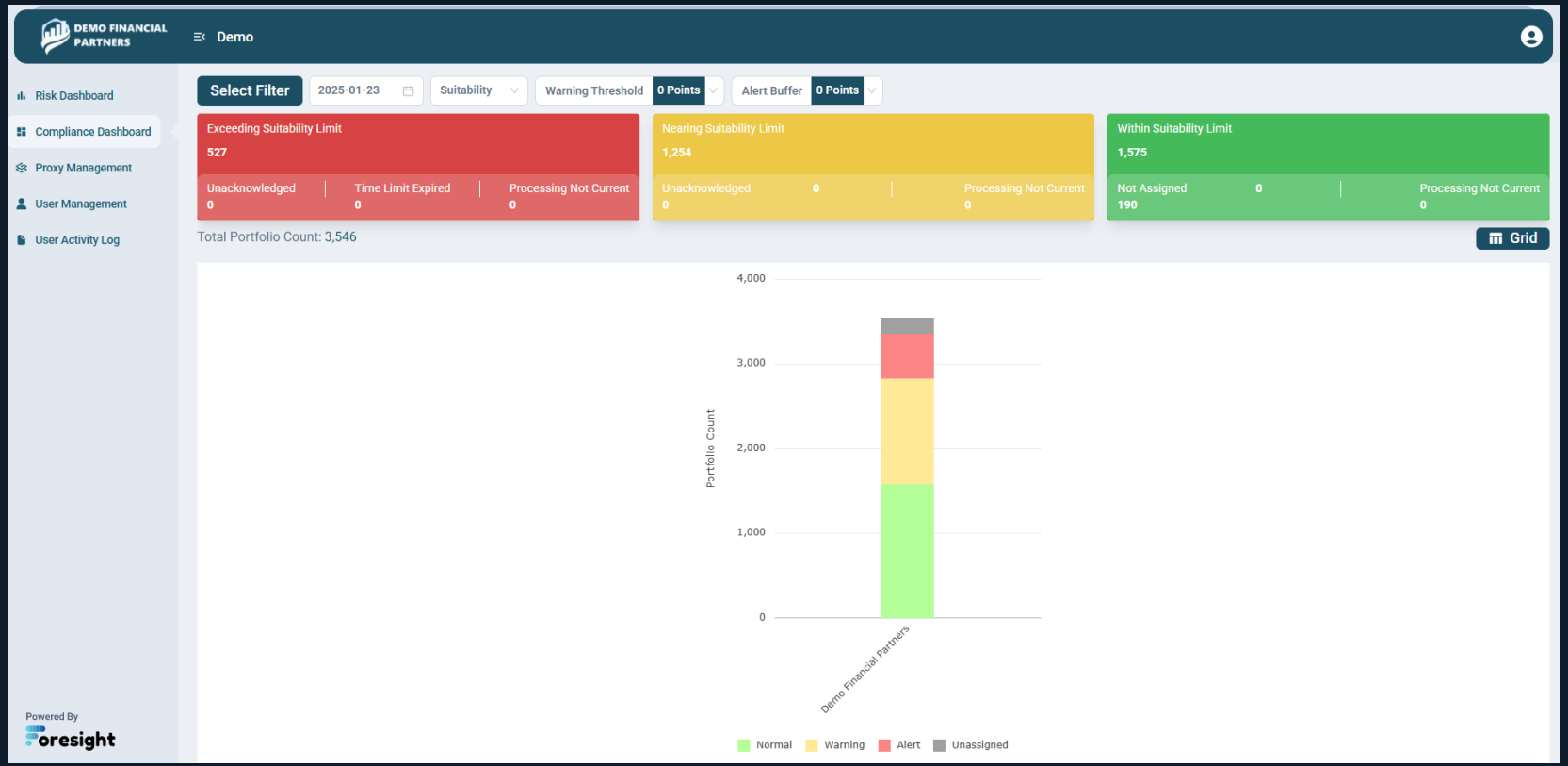
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Compliance Dashboard – Filter to any Level



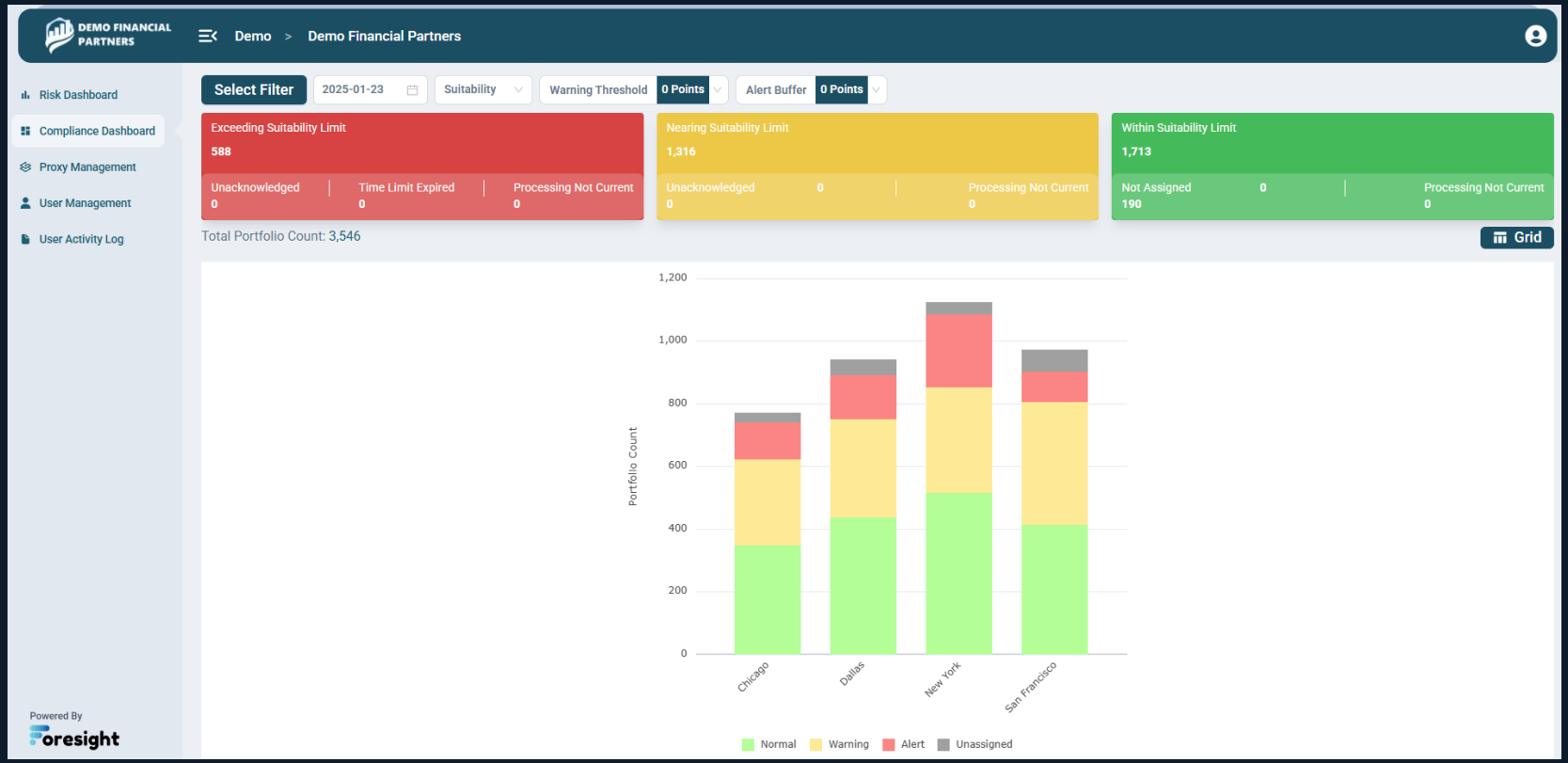
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Compliance Dashboard – Whole Firm



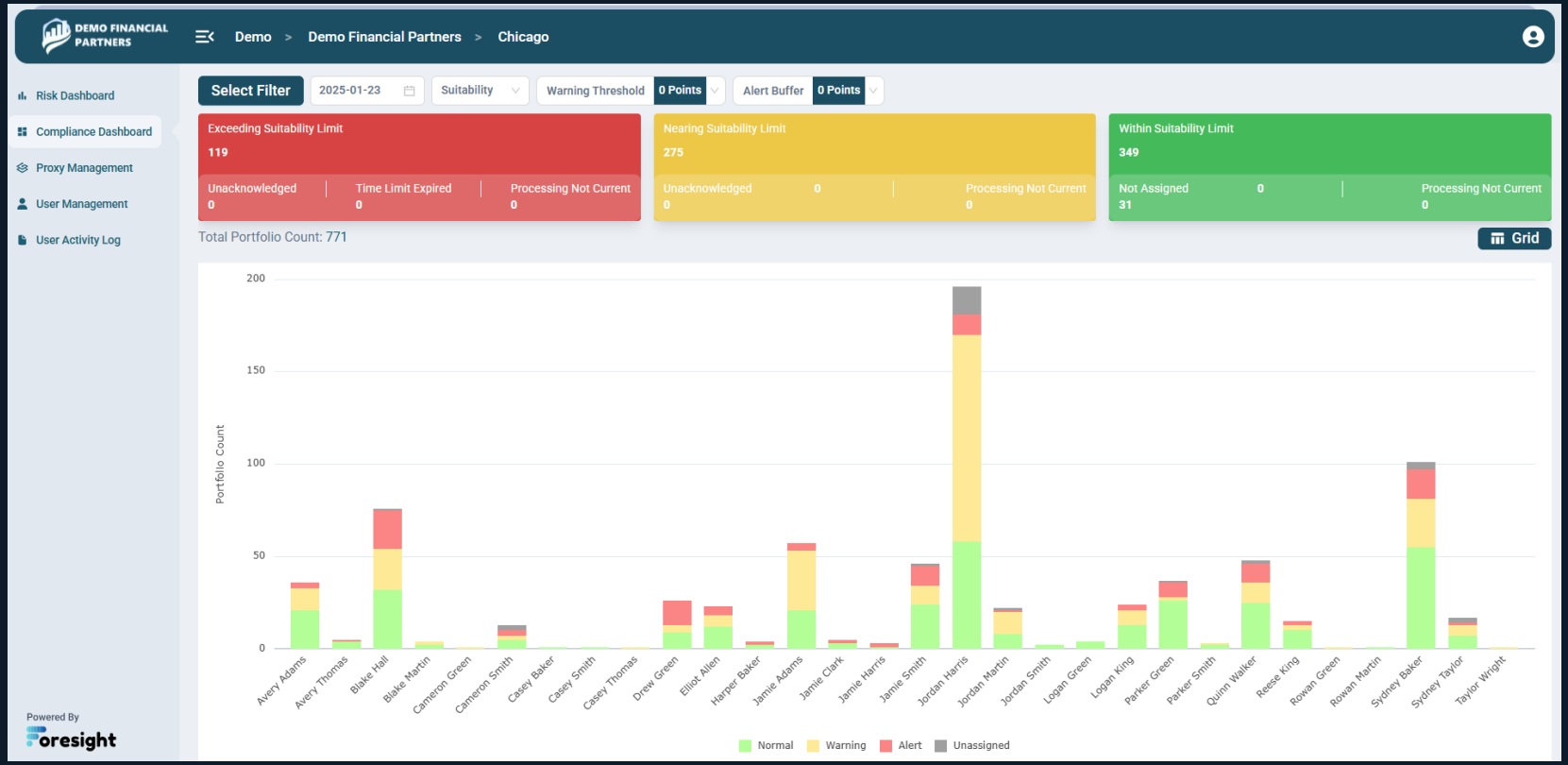
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Compliance Dashboard – Firm Branches



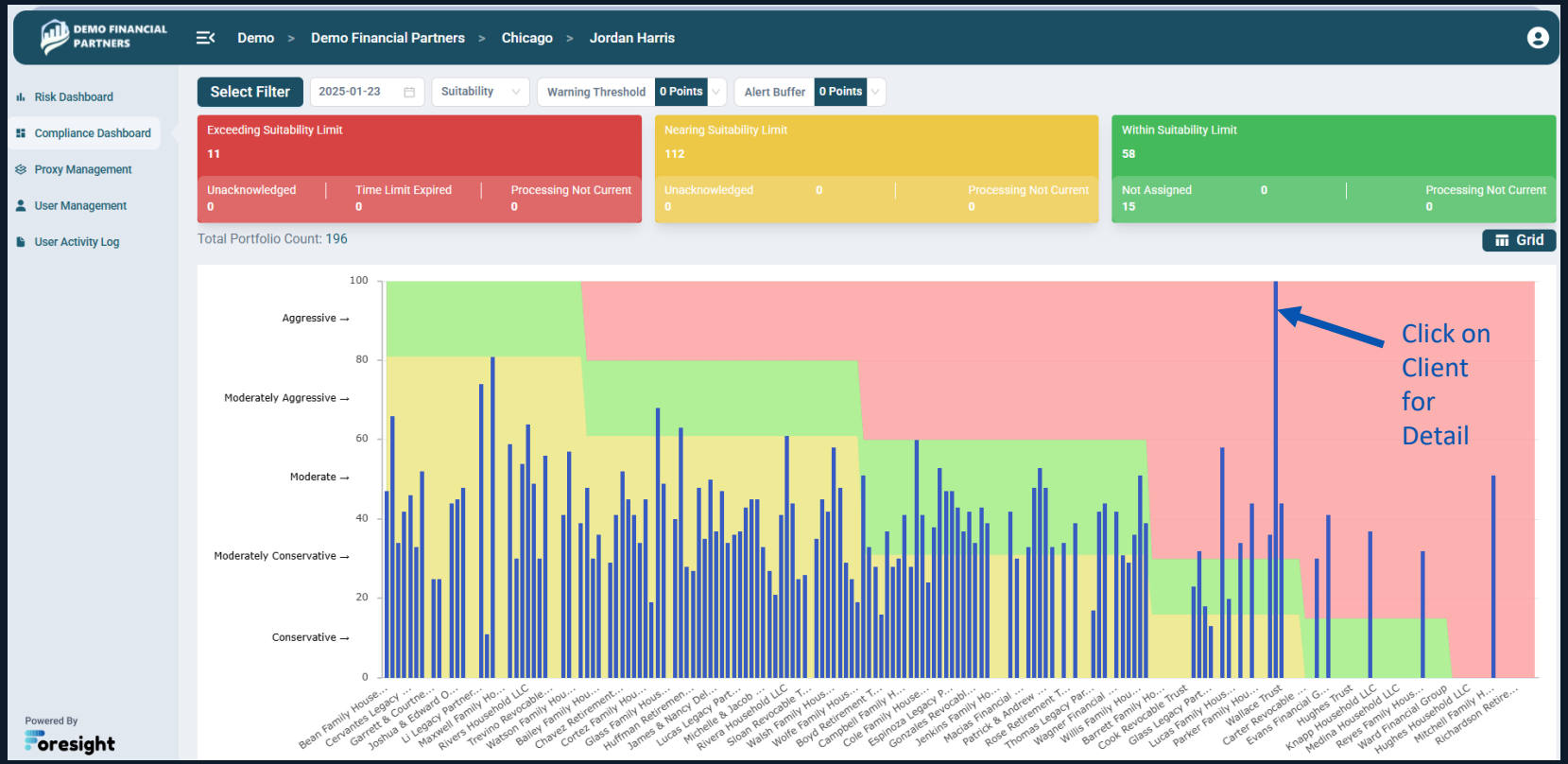
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Compliance Dashboard – Chicago Advisors



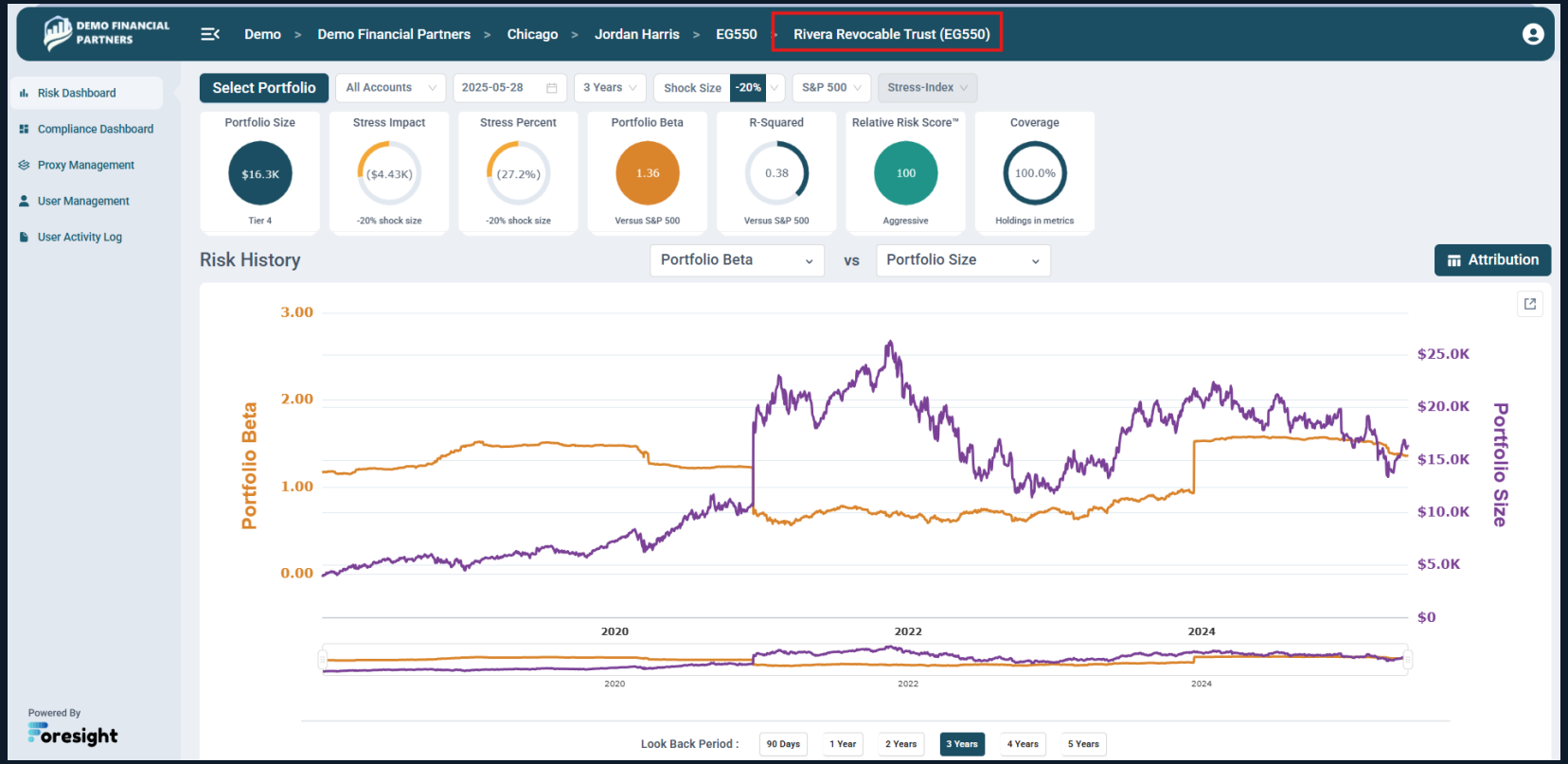
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Compliance Dashboard – Advisor Book



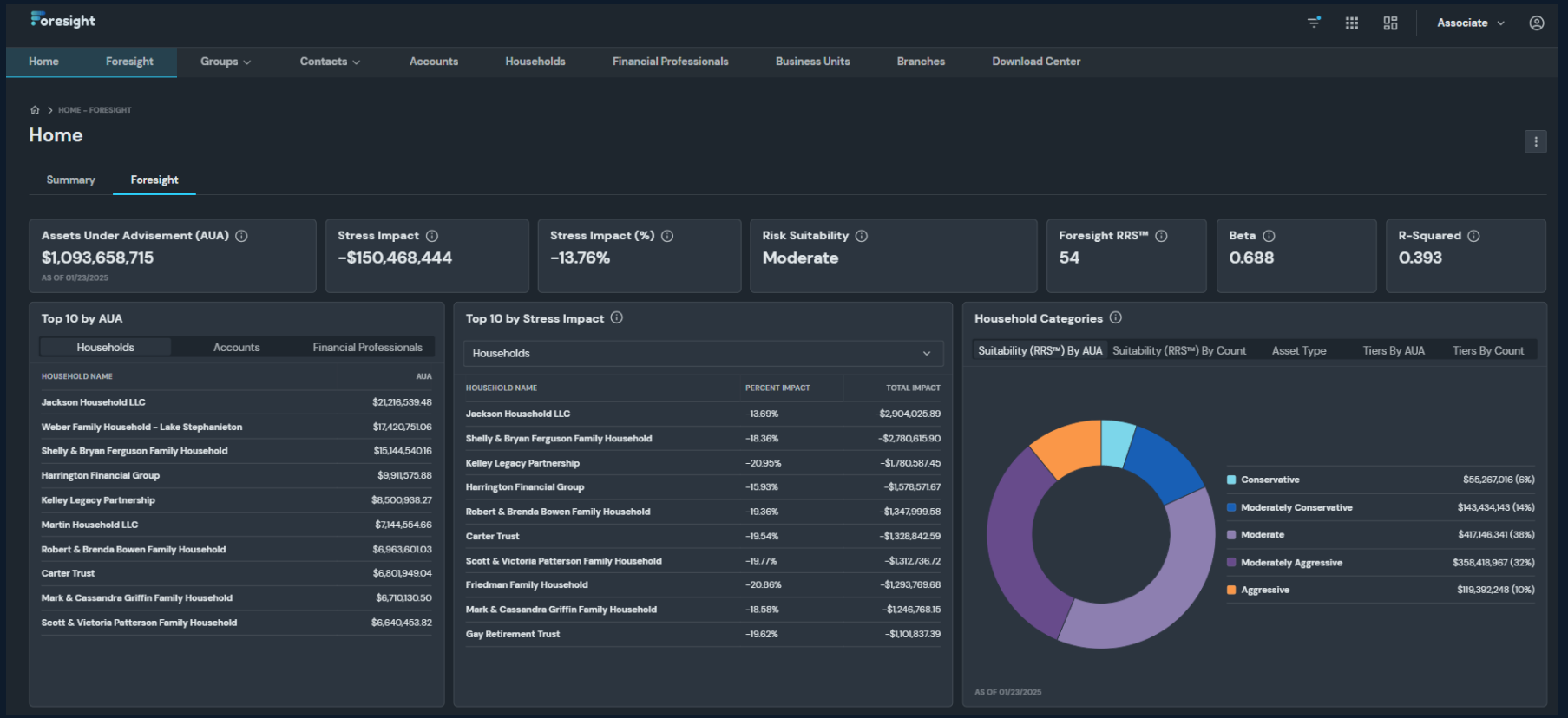
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Compliance Dashboard – Selected Client



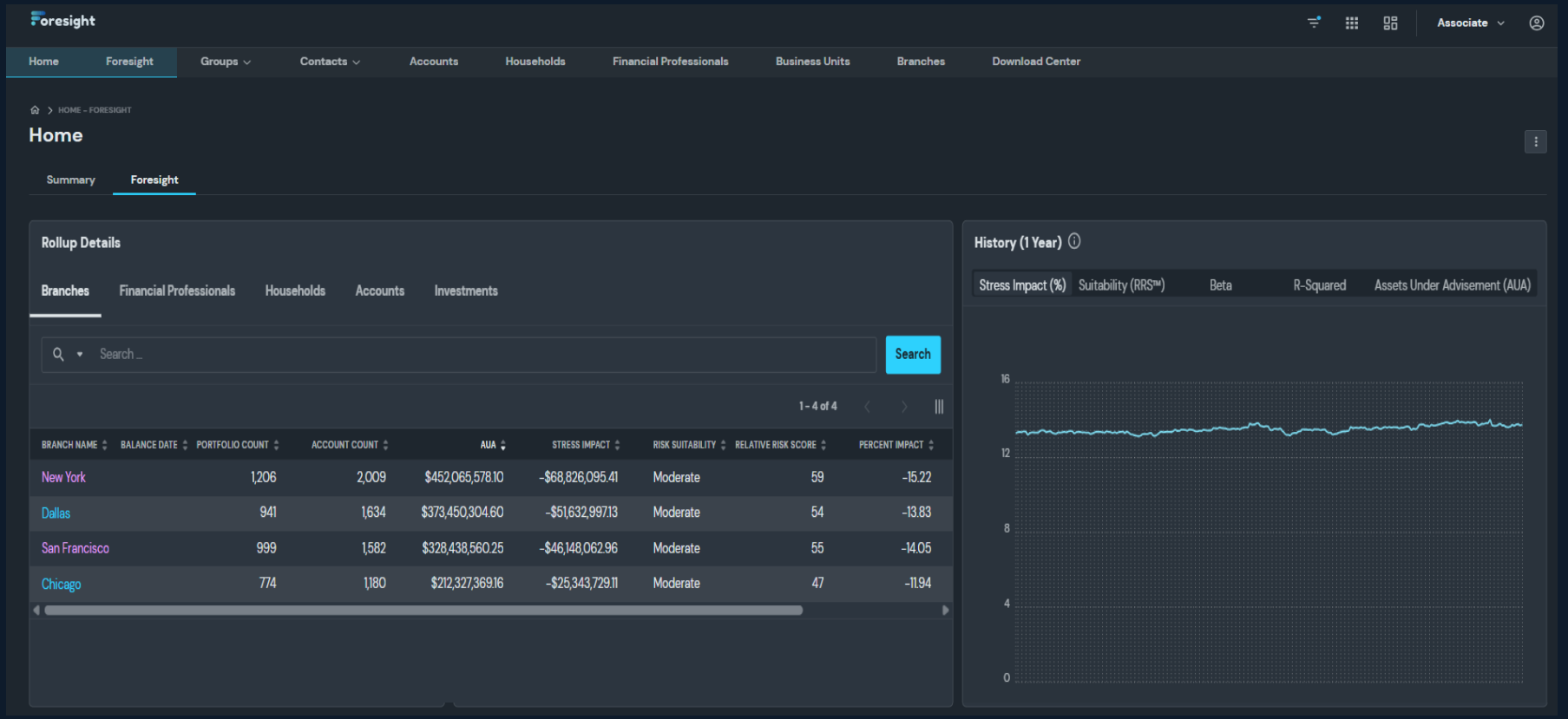
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Foresight Invent Microapps– All Firm Levels



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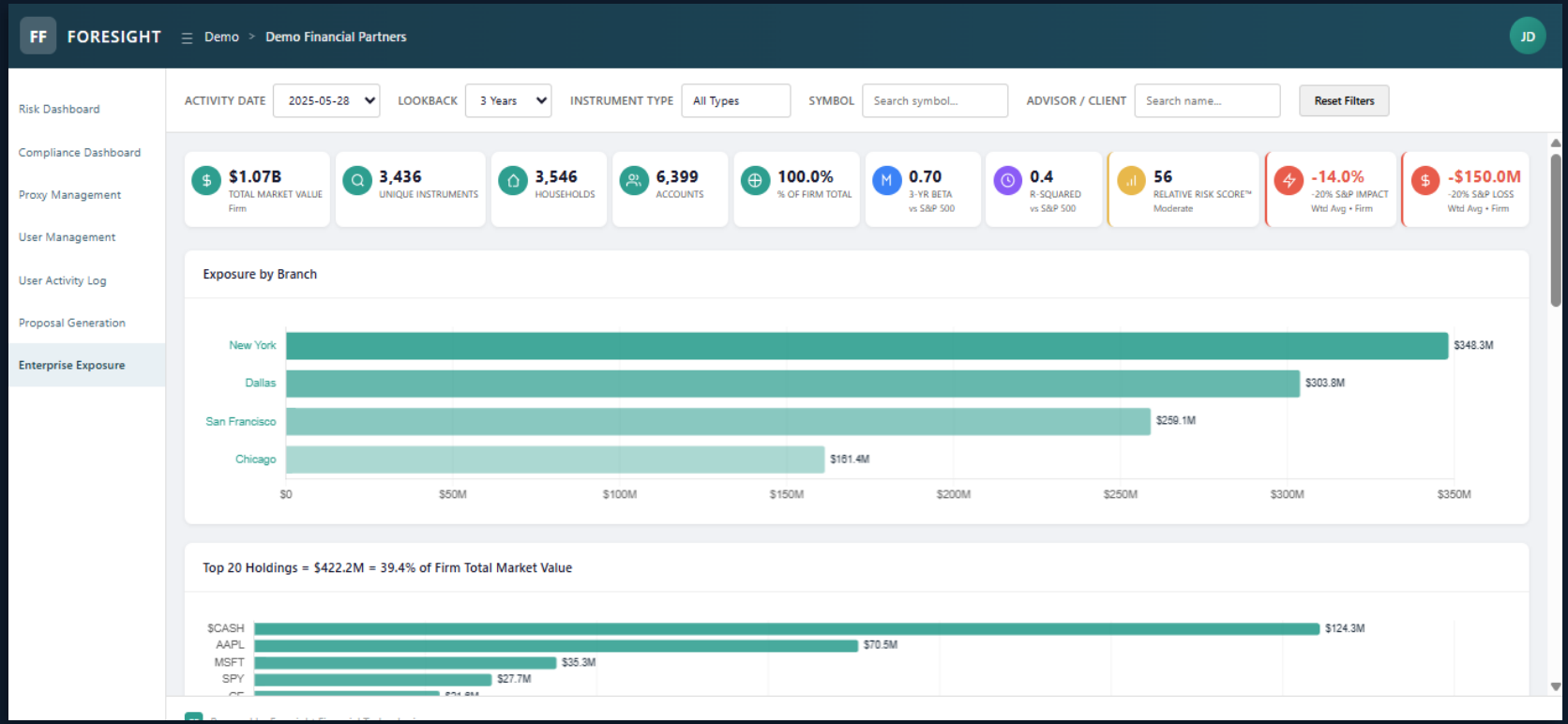
Foresight Invent Microapps– Roll Up Details



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Enterprise Exposure Dashboard

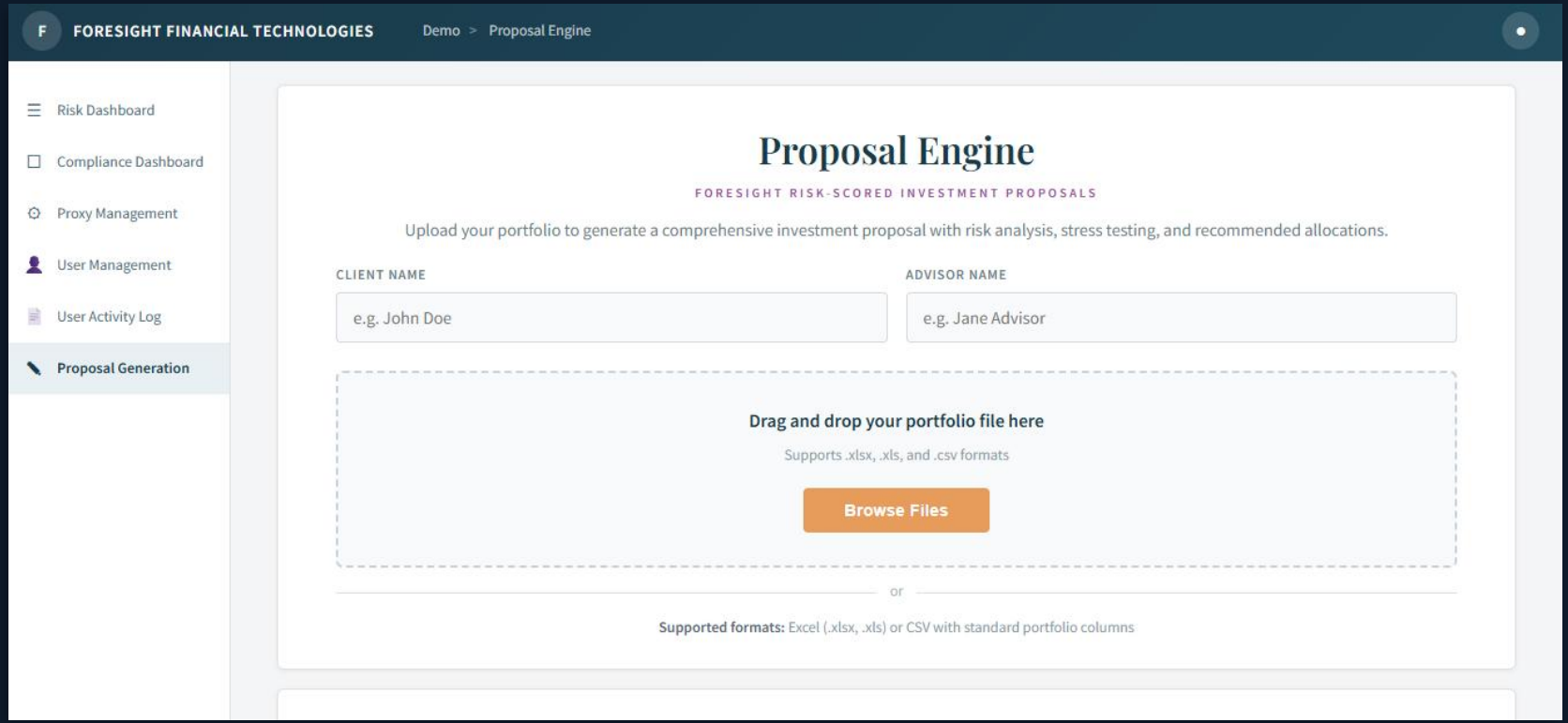
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Proposal Engine

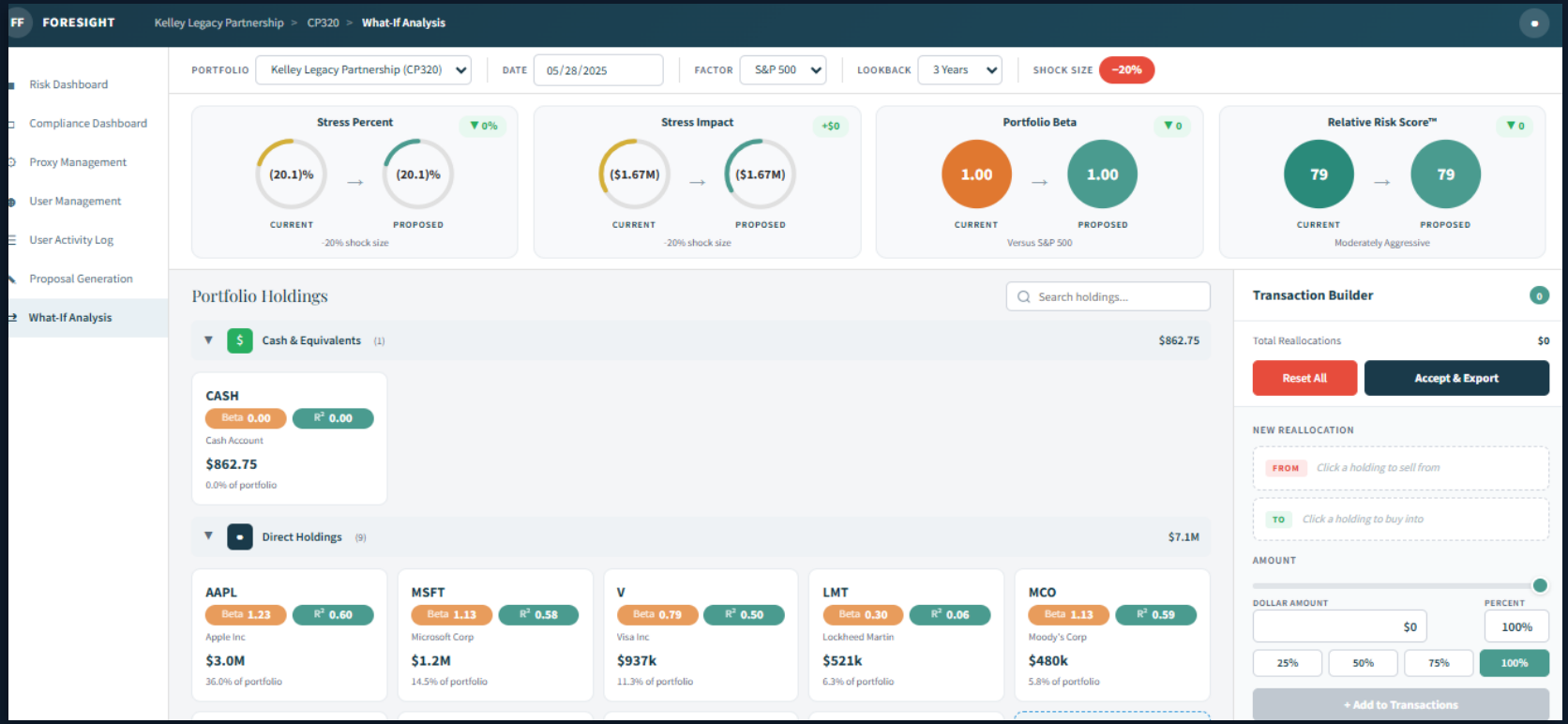
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What-If Analysis

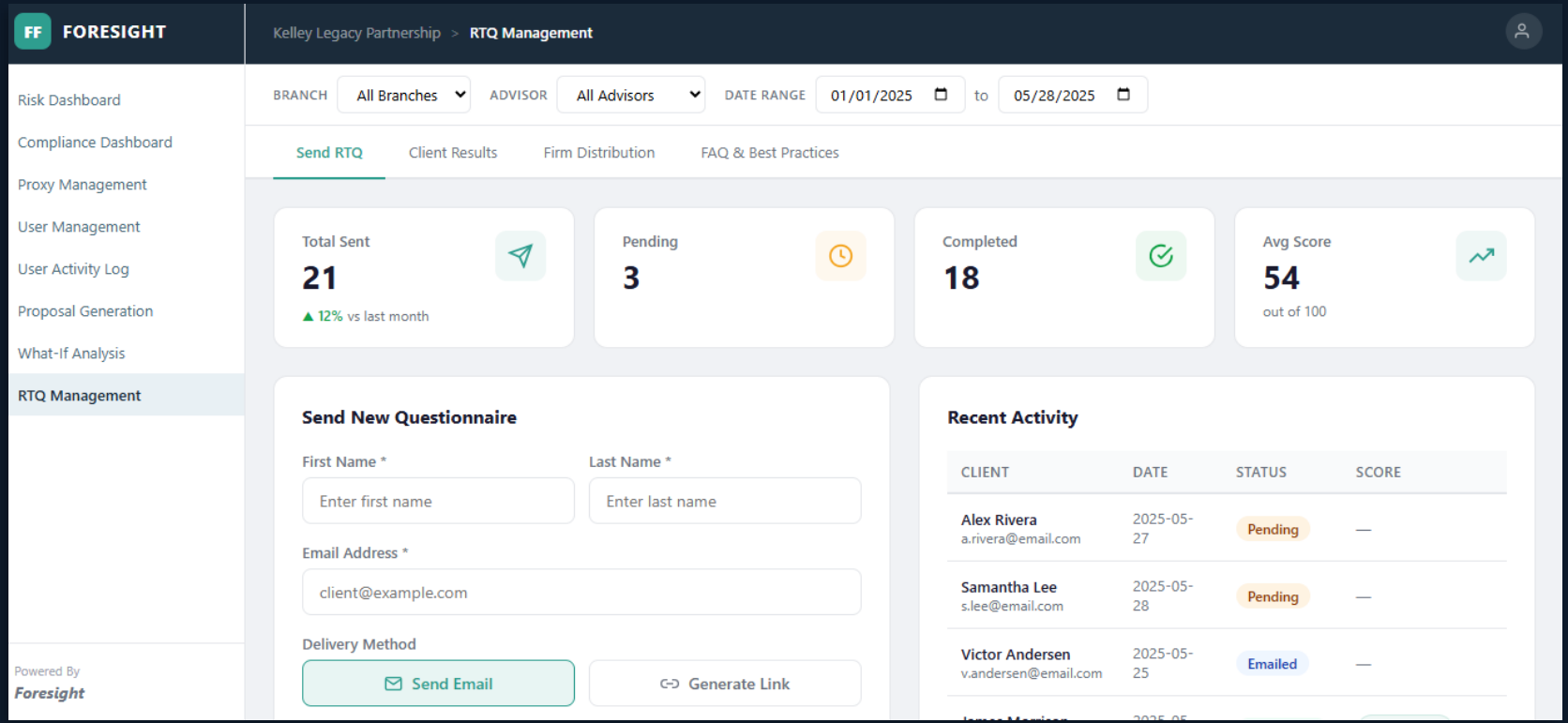
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RTQ Workflow

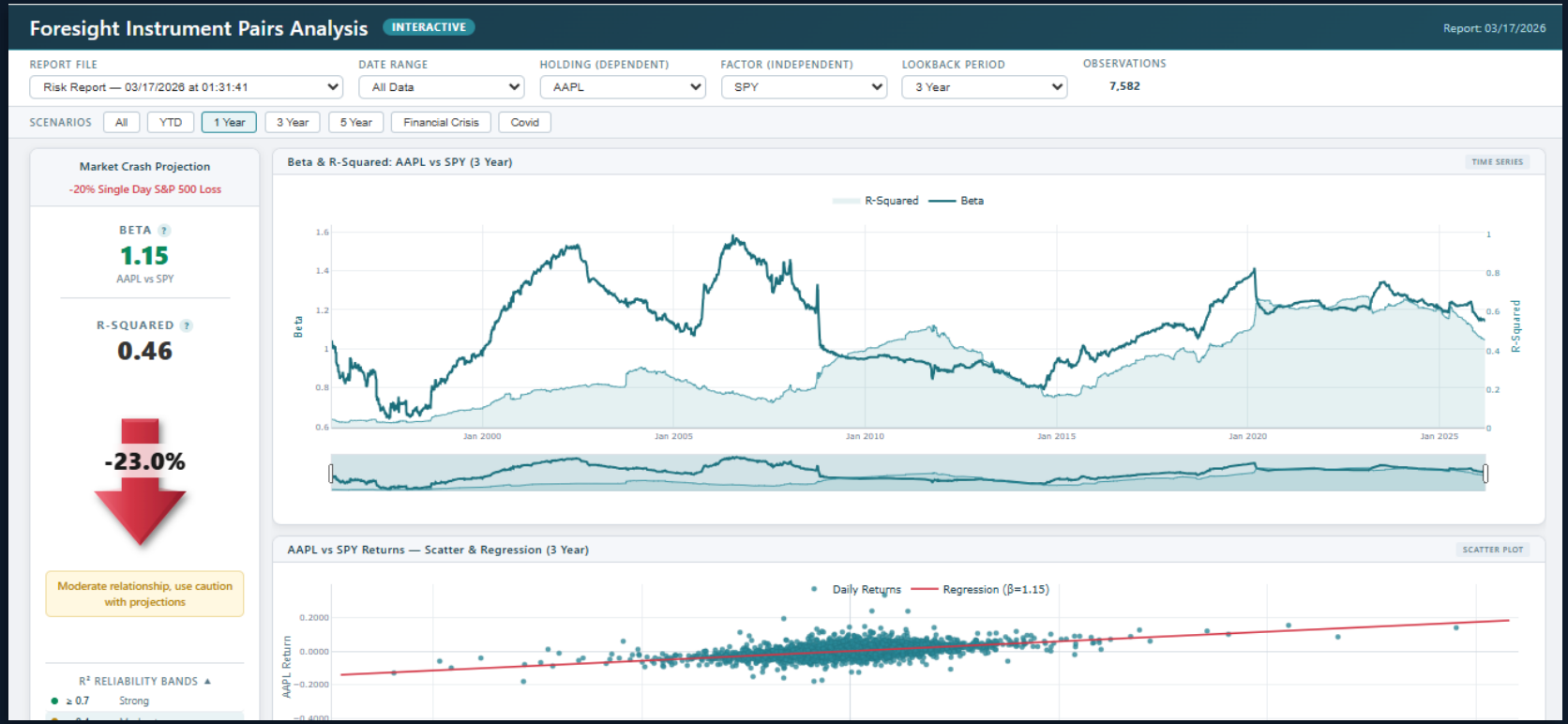
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Instrument Analytics

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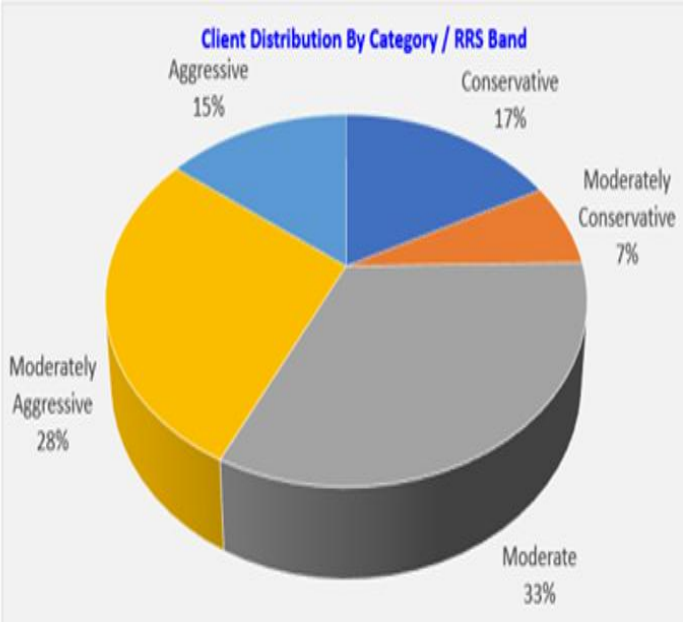
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Foresight RRS Mapping – Scoring after RTQ

Foresight Relative RiskScore™ Bands

Firm Risk Categories	Start	End	Count
Conservative	0	15	624
Moderately Conservative	16	30	261
Moderate	31	60	1,169
Moderately Aggressive	61	80	1,003
Aggressive	81	100	527
Total			3,584

Note: An RRS of 50 maps to a traditional 60/40 portfolio



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Surface Problems Early



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