



Pelican

COMMUNITY INVESTED IN YOUR CHILD'S FUTURE

[PELICANINVESTS.COM](https://pelicaninvests.com)

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Columbia Entrepreneur's
Organization



COLUMBIA
VENTURE COMMUNITY



Dorm Room Fund



MERCURY

TIGERGLOBAL
IMPACT VENTURES



NYC
FINTech
WOMEN

Value Proposition

We are building an accessible **community** and **investment platform** for families so that they can easily invest in the future of the children they love.

- Millennial and Gen Z branded community
- Lower barrier to child investment savings



For 100M Americans, figuring out how to pay for college may seem like an impossible prospect.

- 1 **Limited funds to invest**
- 2 **Community resources lack financial expertise**



Growing Families are a Catalyst for Financial Planning

New parents need support



Family and friends want to give





Pelican

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- **Personalized financial expertise** to fit the needs of growing families.
- **Community support** to receive trustworthy information and expertise.





[Home](#) [Get Started](#) [Send a Gift](#) [FAQs](#) [Community](#) [About Us](#)

LOG IN

Invest in the education of someone you love today.

A gift toward future education.



GET STARTED 

Traction

- **300+** users
 - **\$5,000** total transaction volume
 - **93%** referred Pelican to friends
 - **500+** users on waiting list
-
- **Ongoing product development**
 - **Lowered CAC by 66%** (\$30 to \$10)



TIGERGLOBAL
IMPACT VENTURES



Who knows?

Invest in your
NOBEL PRIZE WINNER'S
future.

pelicaninvests.com




Who knows?

This little ENTREPRENEUR may
create a new UNICORN STARTUP.




Invest in your
ASTRONAUT'S
future.

pelicaninvests.com




Yo Mom!
Did you know that...

Education savings plans grow tax-deferred
and withdrawals are tax-free if they're used
for qualified education
expenses?




Who knows?

This little DOCTOR
may save your LIFE.

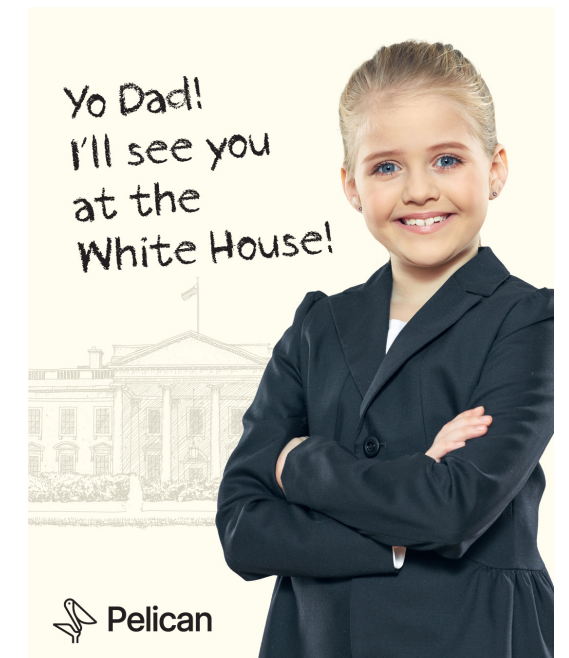



'Drippin' in a fresh
college fund.





Invest in your
ENTREPRENEUR'S
future.

pelicaninvests.com

Yo Dad!
I'll see you
at the
White House!



Go to Market



BRAND AWARENESS

- SEO
- Events and webinars
- Digital marketing



PARTNERSHIPS

- Build strategic partnerships
Micro influencer campaign



REFERRALS

- \$10 for every new customer referred



ENGAGEMENT/ UGC

- Customer testimonials
- User generated content

Market Opportunity

\$1.2T

Annual wealth
transfer opportunity

Record high tax-free
gifting and rollover

\$35.6B

Community platform
advertising revenues

\$10B

Education affiliate
marketing

73M

baby boomers

22M

parents with kids <18

30M

children seeking
higher education

Business Model

Phase 1: 18-24 months

1

SaaS (D2C)

Expert portfolio, tax,
and action planning.

\$4.99 monthly fee

2

Partnerships

Lead gen for new
financial accounts
created.

\$75 ARPU/
transaction

3

Advertising

Promotional and
marketing partner
content.

\$1,000/ listing

Savings Apps: How We Compare



Financial	RIA	RIA	RIA + brokerage	Partnerships
Account Type	UGMA, Crypto	529	Custodial, Crypto	529, UGMA, Whole Life, ETFs, RIA, and more
Monthly fees	\$2.95/ child \$4.95/ multiple children	\$1.99 per contribution	single membership fee \$4.99/ month	Freemium, \$4.99 for advanced features
Community features	Blog	Foundation	Rewards from brands	Access trusted financial professionals
Tax Deductions for gifting				✓
Action Planning				✓

Value Proposition

- 1 Financial Partnerships**
Pelican works with trusted financial partners to offer a full spectrum of financial products.
- 2 Tax-smart Expertise**
Only platform that helps with wealth transfer.
- 3 AI Powered Algorithm**
Only platform that provides recommendations of trusted financial products.

Award-winning team backed by leading organizations



Alexandra Bono
Founder & CEO



William Su
CTO



Alia Khayrullina
Brand & Community



Zaylan Jacobsen
Product Engineer



RevTech Labs Accelerator Goals

As we launch our V2 product in March 2023, the Accelerator provides critical advisor, partnership, and financial support at a pivotal time.

1

FinTech-specific support

- Refine product roadmap
- Best practices
- Networking

2

Build partnership network

- Relationships with financial and insurance providers

3

Capital to reach out next milestones

- Automated action-planning and 529 account creation
- Complete P2P payments infrastructure



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Financial Platform Detail

Personalized financial expertise to fit the needs of growing families.

- **Unique customer action-planning experience with proprietary algorithm** to fit your family's needs.
- Marketplace of **trusted financial providers**.
- **P2P payments infrastructure** enables gifting toward a child's college savings from relatives, friends, and employers.
- Streamlines **tax-smart expertise** and wealth transfer.



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education of
someone you
love today.

A gift toward future education.



Community Platform Detail

Community support to receive trustworthy information and expertise.

- Receive **professional advice from investment experts** and trusted financial providers from partnerships through forums, programs, and events.
- Download **iOS and Android app** to join conversations and communities with common interests across meaningful topics.
- Galvanize community with Pelican **action-planning templates** to easily share your journey with relatives, friends, and community members.



"It's a win-win and glad it's reducing consumption at the same time."

- Caregiver, Philadelphia



Target Customer Personas

New parents need support

Madeline



Age: 29
Job: Teacher
Location: Brooklyn, New York

"As a parent, I'm responsible for setting my kid up for college"

Day in the life

Madeline recently started teaching at a high school in Brooklyn. She wants to save money, but she hasn't had time to organize her various finances, so she continues to keep everything in one account.

She and her husband welcomed their first child about 2 months ago and have started thinking about their child's financial future already, but it's a huge investment of time and energy and she's not sure where to start.

Goals		Needs		Pain Points
Start a college fund for her child	→	Find a suitable plan to help start saving/investing	→	Not really educated on how to organize finances
To better organize her finances	→	Research the value of investing early for your child college fund	→	Finds it difficult to manage financial priorities living in a big city
Have trust in her financial plans	→	Research great financial plans for savings and investing	→	Feels frustrated because she does not know what plans is best for her

Family and friends want to give

Alyssa



Age: 58
Job: Retired Nurse
Location: Queens, NY

"I donate because it can be really gratifying but it has to be something I believe in. I want to see where it goes and what it's actually used for."

Day in the Life

Alyssa recently retired within the next couple of years. She has a lot of experience with saving money for her 401k and has already paid off all her student loans. She likes to support her friends and family whenever she can.

Because she knows the struggle of paying for school she likes to donate whenever possible. She doesn't want her contribution to be public but does want it to be sincere. She wants to make sure her donation will be used for education and that it's saved in a secure place.

Goals		Needs		Pain Points
To help support her family & friends	→	A way to give discreetly and remotely donate to the funds	→	Worried about undertones of giving cash; Unsure of another way
To personalize her donations for people	→	Ability to leave a message & reference back to their donation	→	Feels alienated from the emotional connection of supporting loved ones
Have a sense of security when sending money	→	Way to verify where it's going, what it's used for & that it was successful	→	Stressed over long verification process & uncredible signal upon receipt

Testimonials

"Gifting takes the pressure off of starting to save while managing expenses as a new parent."

*-Registered nurse,
Philadelphia*

"Perfect for grandparents! Especially since we are already getting gifts of 'things' we don't want or need!"

*-Benefits manager, San
Francisco*

"I would tell any friend that this is the stuff that matters and makes a difference."

*-Financial professional, New
York City*

Market Opportunity Detail

U.S. Market

\$1.2T

Annual wealth transfer
opportunity

\$14.8B

Gift spend on children

\$3.7B

Child gift spend on
education

Sources: [USA Today](#), [Quartz](#), [Business Wire](#)

\$480B

529 savings plan market

\$40B

529 savings plan market
growth 2020 to 2021

\$10B

Education affiliate
marketing

Source: [Statista](#), [Kinsta](#)

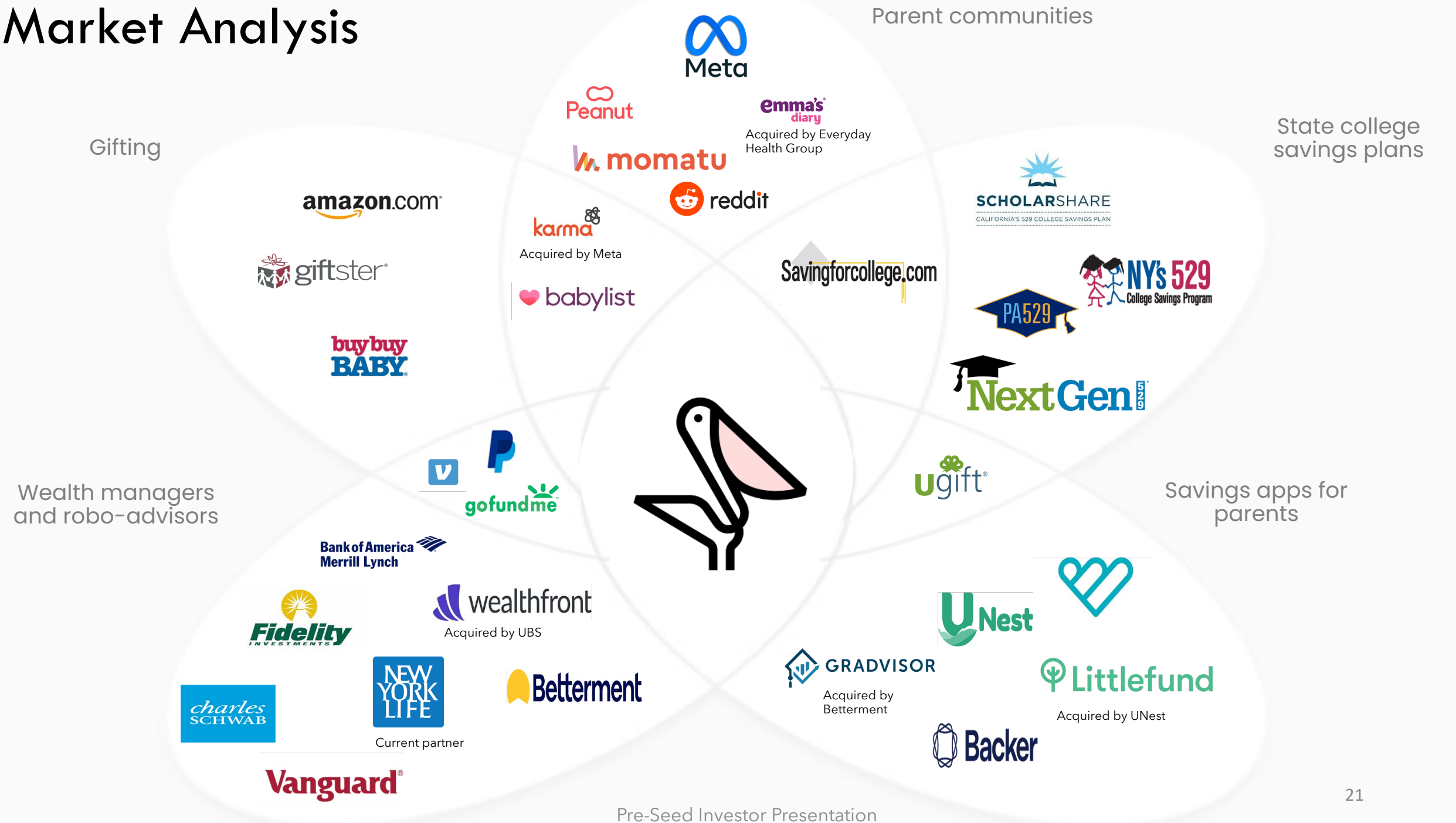
\$35.6B

Community platform
advertising revenues

- 73M baby boomers
- 22M millennial parents
- 30M children seeking higher education

Source: [Internet Advertising Revenues](#), [ChildStats.gov](#), [NCES](#)

Market Analysis



Strategic Partnership Opportunities

1

2

3

4

Financial services providers

- Wealth managers
- Robo-advisors
- State college savings plans
- Brokers and agents

Parenting communities

- Health care providers
- Baby care resources
- Facebook groups
- Female centric workplaces

Education and EdTech

- Daycares
- Schools
- Goal Setter
- Greenlight card
- Government programs

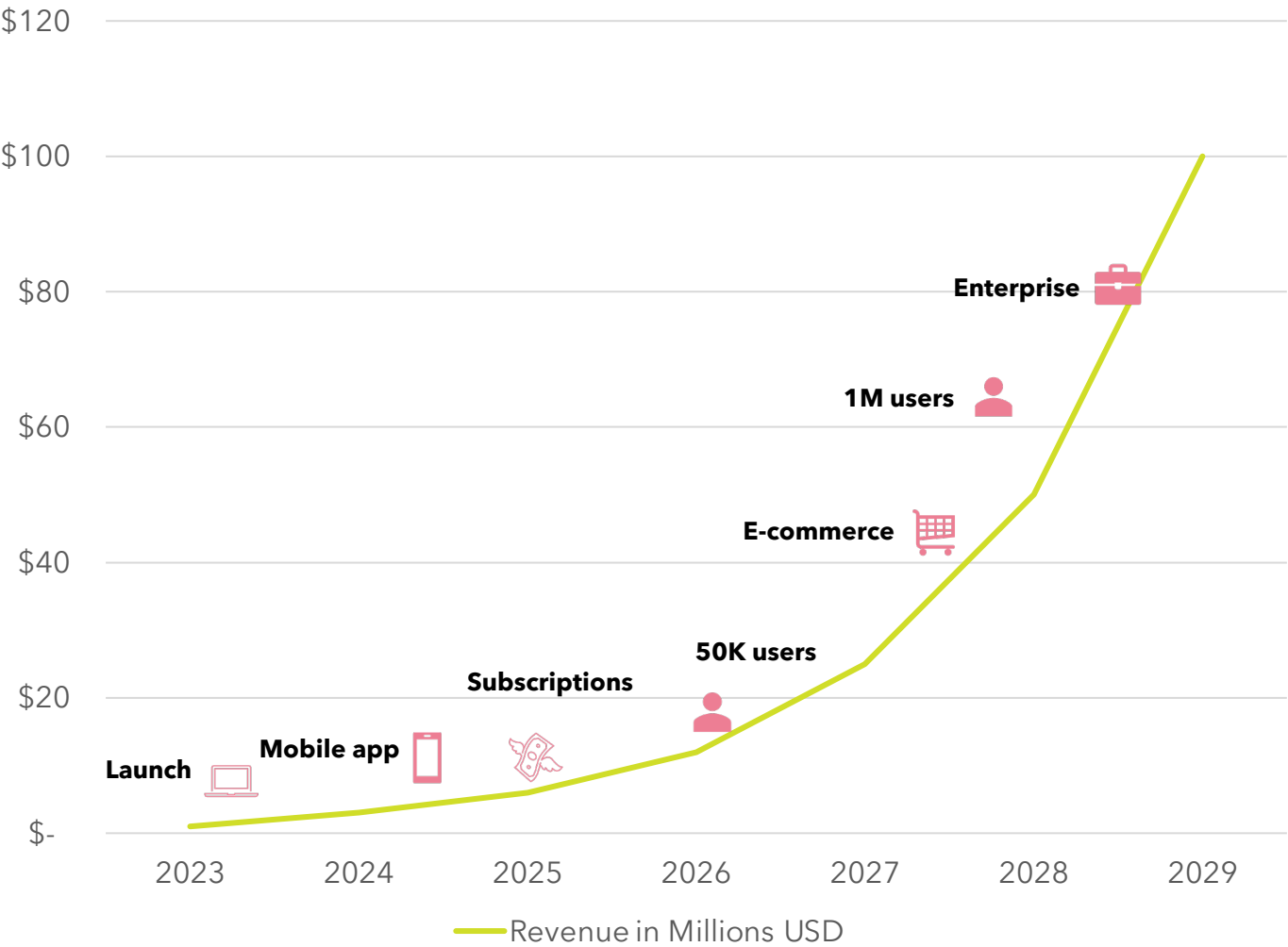
Gifting and consumer

- Gift stores
- Gift registries
- Event planners
- E-commerce partners

Financials

	Year Ended 12/31			
	2023	2024	2025	2026
Total Users	11,071	19,253	34,109	50,432
ARPU (end of period)	\$75	\$100	\$120	\$150
CAC (end of period)	\$19	\$17	\$13	\$13
LTV (end of period)	\$284	\$293	\$298	\$307
LTV/CAC (end of period)	14.77x	17.57x	22.36x	23.04x

Our Path to \$100M ARR



Accolades and Awards

Accelerators and Programs

- Columbia Venture Community Project 2.8 accelerator
- Columbia Startup Lab
- Dorm Room Fund Female Founder's Track
- Galvanizer female focused incubator at Stanford GSB
- Mercury Raise Seed
- General Assembly UI/UX Partnership

Awards

- Accelerate(Her) Fund \$50K grant sponsored by Tiger Global Impact Ventures with Hello Alice and the Global Entrepreneurship Network
- 2022 Founders Initiative grant, sponsored by the Eugene Lang Entrepreneurship Center and the Columbia Entrepreneurs Organization at Columbia Business School
- Inspiring FinTech Female founder by New York FinTech Women and New York Stock Exchange



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