

# SEVENS REPORT *alpha*

**Webinar #15: Earn “Super Alpha” on Cash**

**Thursday, March 15, 2018**

**Presenter: Tom Essaye**

**Guest: Gary Zimmerman (MaxMyInterest)**

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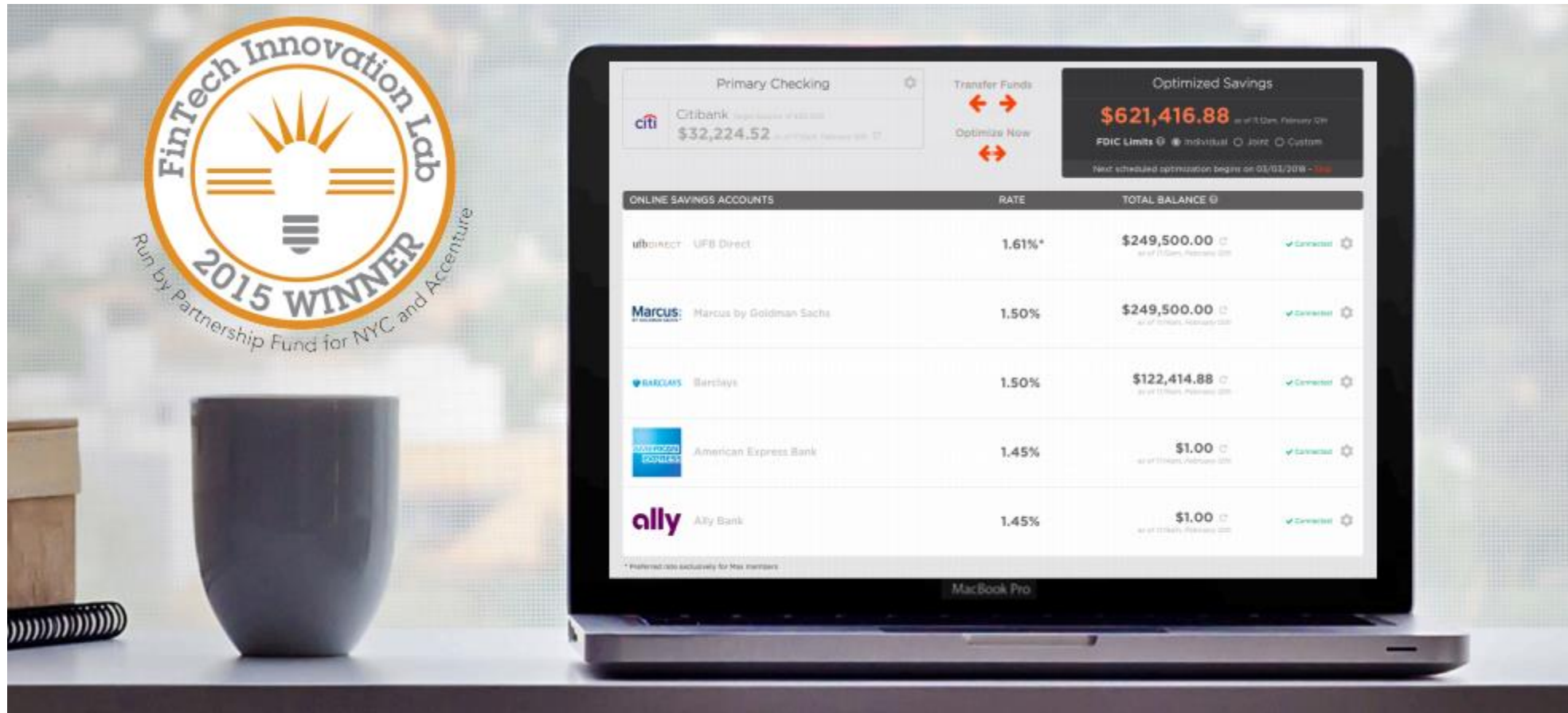
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## Goals for Today's Webinar

- Gary Zimmerman – Founder & CEO of MaxMyInterest
  - Development of MaxMyInterest (“Max”)
  - How Max Works
  - Why Max is an Ideal Solution for Idle Cash
  - Beat Your Clients to the Punch Before They Ask You About Max
  - Ways Financial Advisors Can Utilize Max (Max Can Help Grow AUM)

## Max: The *Intelligent* Cash Management Solution

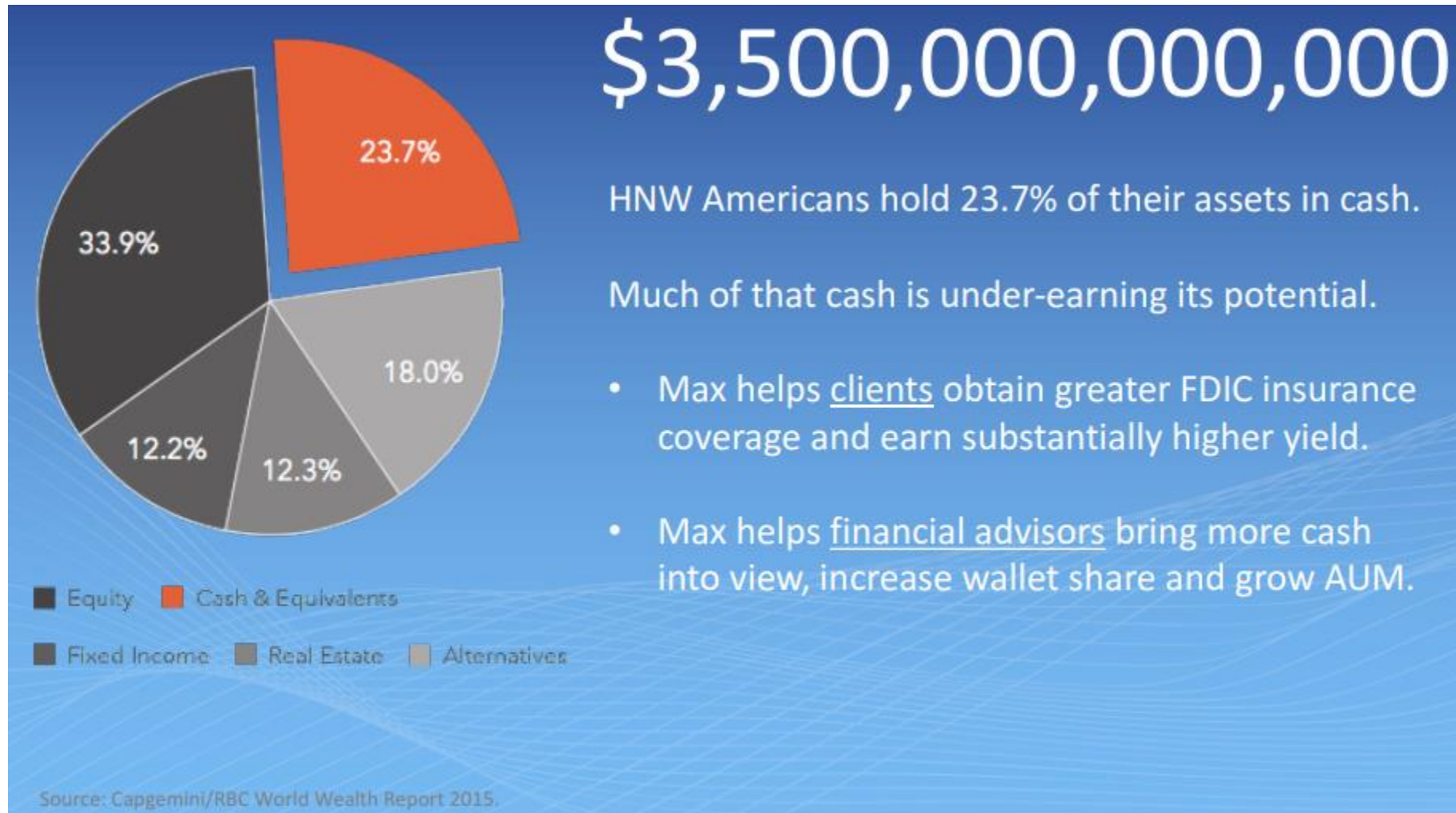


## How Max Works

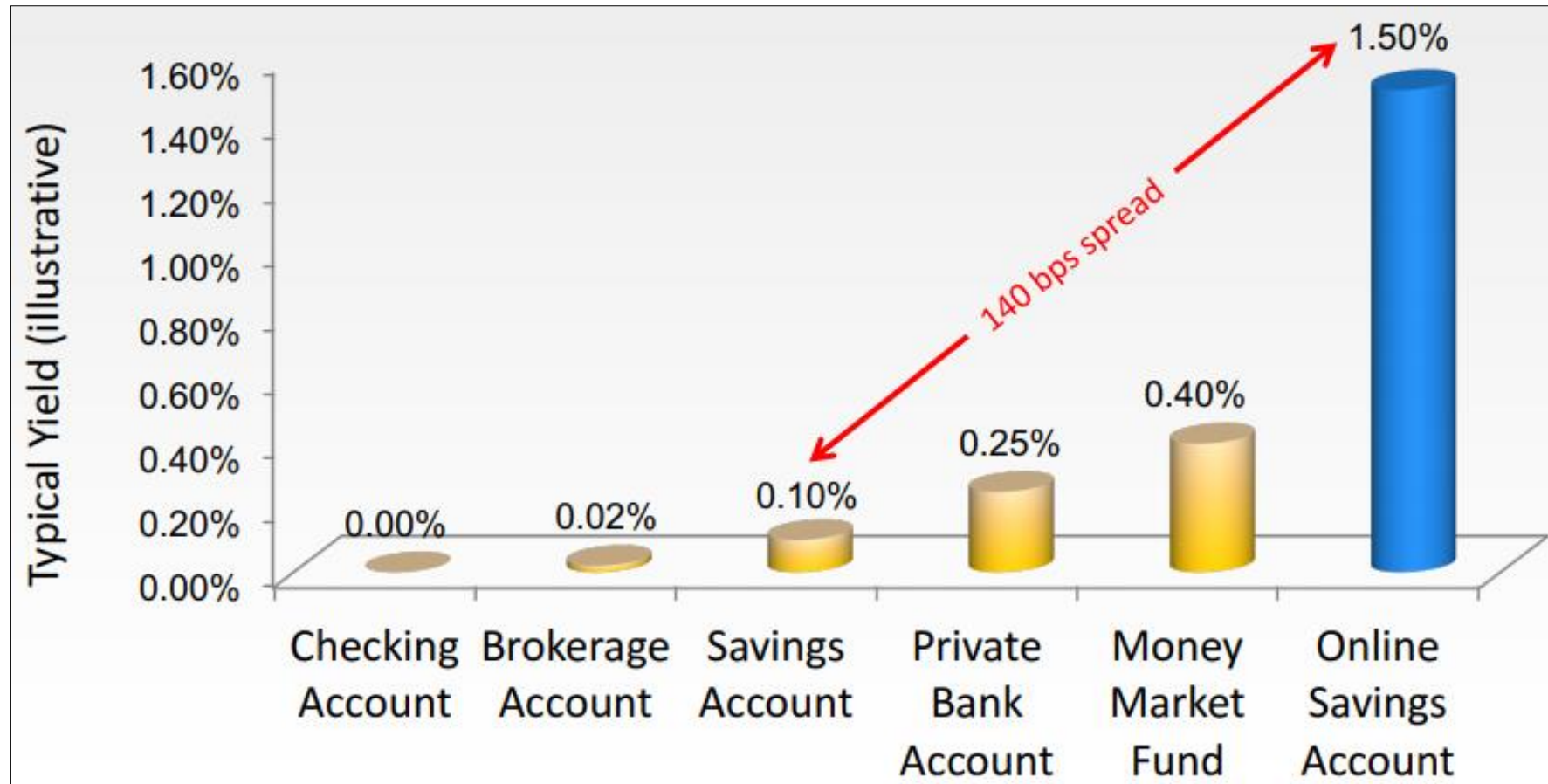
- Think of Max like a simple “hub and spoke” system.
- Max monitors changes in rates daily, and periodically rebalances funds among client accounts, automatically.
- Max is not a bank and never takes custody of funds.



## High-Net-Worth (HNW) Market Opportunity



## Fiduciary Solution for Cash: Earn Dramatically Higher Yield, Without Increasing Risk or Sacrificing Liquidity



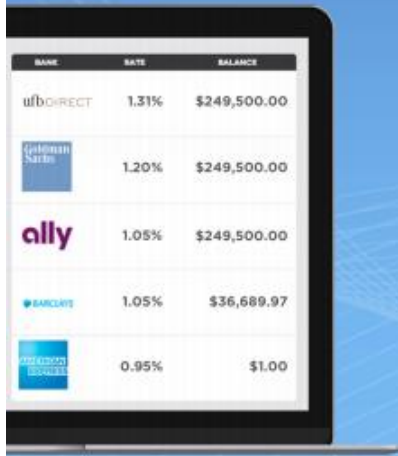
## Max Can Deliver Quantifiable Value Creation

		Incremental Interest Income	
Client Segment	Cash Balance	In Year 1	Compounded Over 20 Years
UHNW	\$10,000,000	\$143,000	\$3,283,989
HNW	\$1,000,000	\$14,300	\$328,399
Affluent	\$250,000	\$3,575	\$82,100
Mass Affluent	\$50,000	\$715	\$16,420

Incremental interest income of 1.43% based on difference between weighted average interest rate being earned by Max members of 1.52% and Bankrate.com national savings average of 0.09%, as of March 12, 2018. Does not factor in annual Max membership fee of 0.08% (billed quarterly.)

## Full-Featured Client Solution

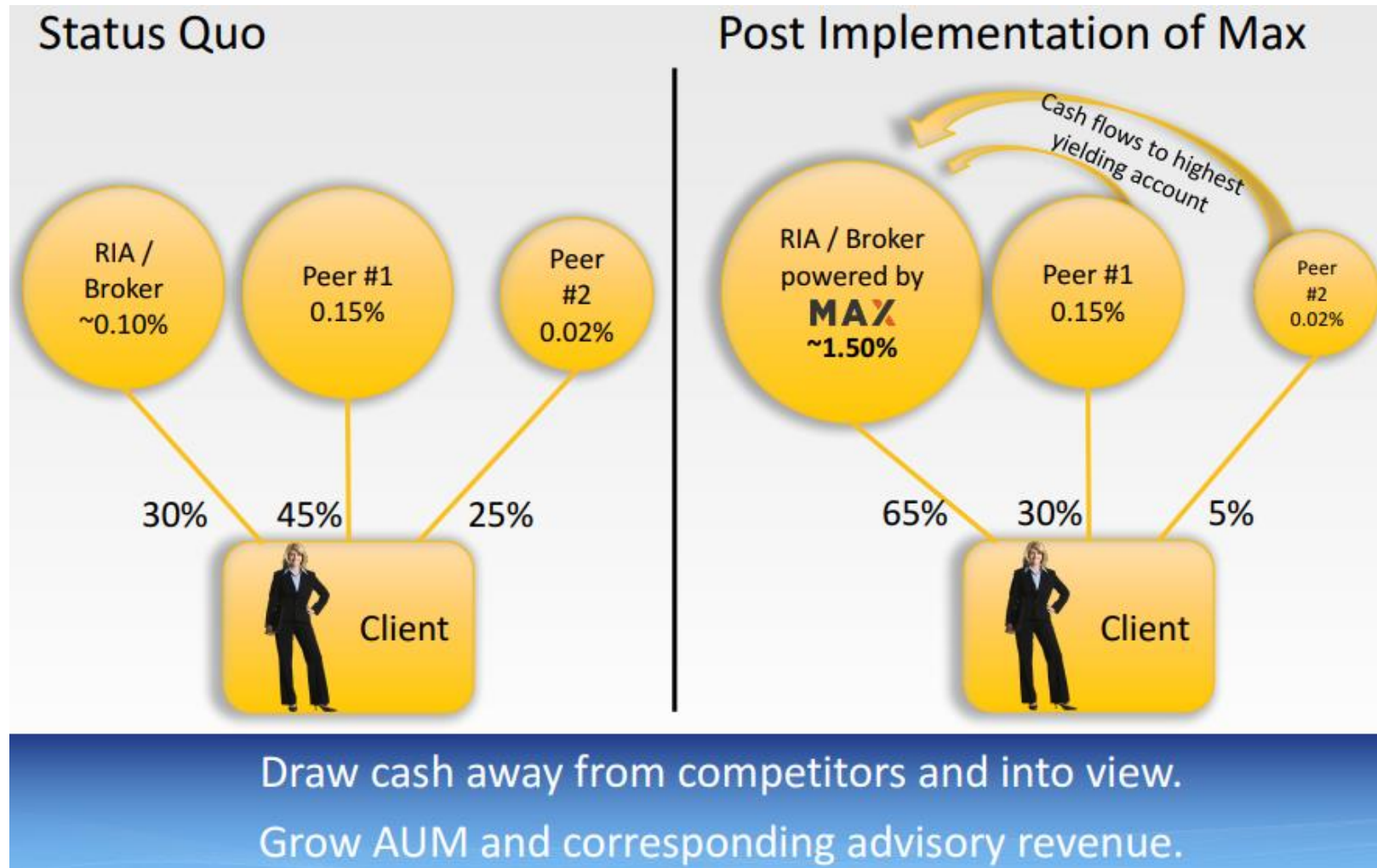
- ✓ Earn >1.50% on liquid cash
- ✓ FDIC insured (up to \$5mm per couple)
- ✓ Automatic rebalancing and cash sweep
- ✓ Account aggregation
- ✓ Performance reporting
- ✓ Common application
- ✓ Move funds with one click
- ✓ Consolidated tax reporting
- ✓ Mobile optimized



NAME	RATE	BALANCE
ufbDIRECT	1.31%	\$249,500.00
Goldman Sachs	1.20%	\$249,500.00
ally	1.05%	\$249,500.00
BARCLAYS	1.05%	\$36,689.97
AMERICAN SOUTHERN	0.95%	\$1.00



## How Max Can Benefit Financial Advisors



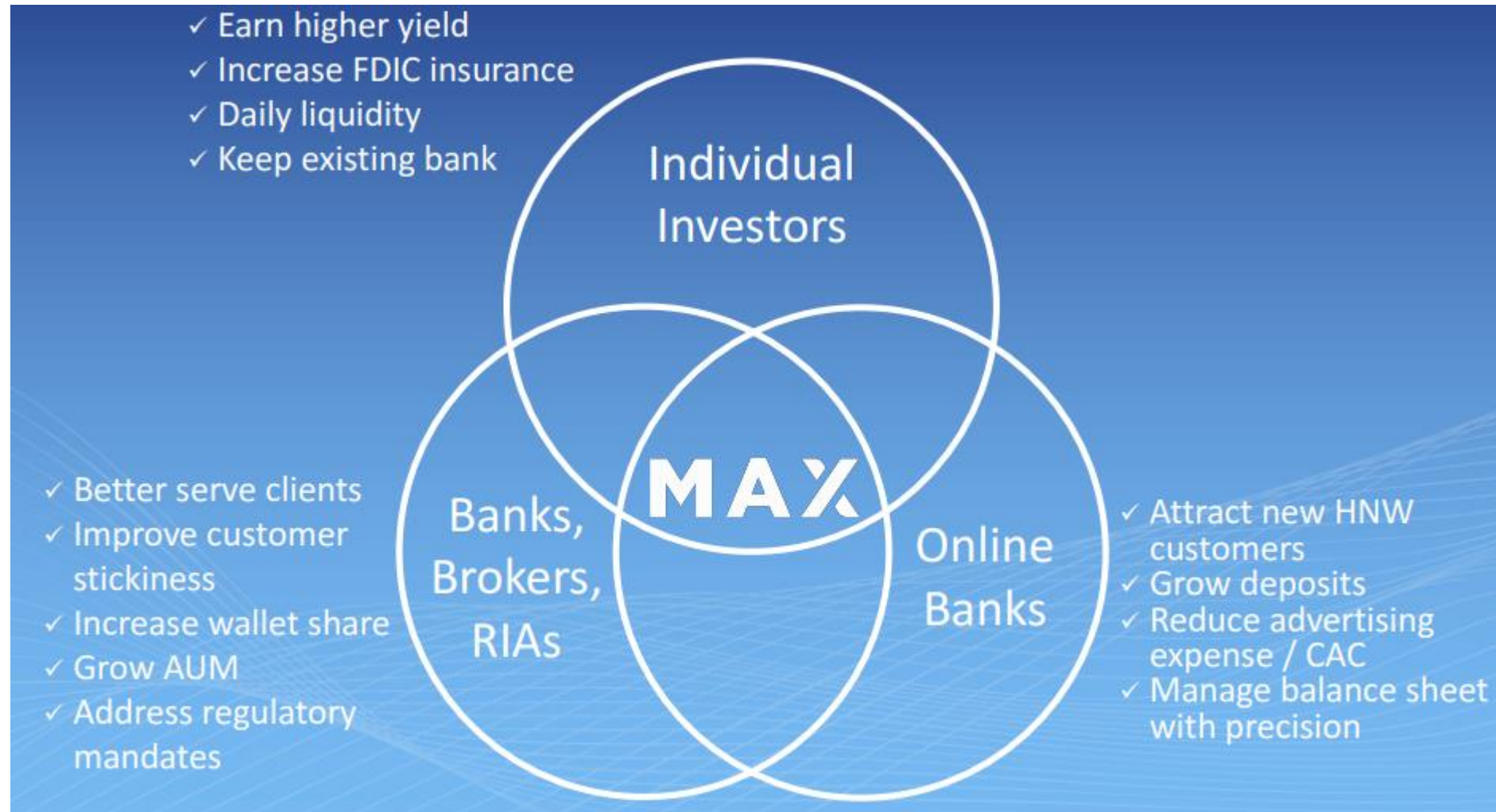
## What Max Customers Are Saying to Their Financial Advisors When They Learn About Max

- *“It sounds like a really great way to optimize various accounts.”*
- *“Please look into this opportunity to earn more interest on cash.”*
- *“MS is behind the times. You need to establish a relationship with Max so I can earn better interest on cash.”*
- *“This interests me. I will call you next week.”*
- *“Have you heard about this outfit? I read about them in the Economist. They claim to move funds between bank accounts to optimize interest rates. The advertising implies that they can get around 1% versus whatever bank you have is paying.”*
- *“I saw a reference to this website in the WSJ and found it to be pretty interesting. Please take a look and we can discuss when you come to Boca.”*

## Max Tools for Advisors

- Max Advisor Dashboard
- Support for Custodial Accounts
- Custom Co-Branding
- Differentiated Onboarding Process
- One-Click CRM Integration
- API and SSO Integration with Advisor & Client Portals

## Individuals, Advisors, and Online Banks Win with Max



## Contact Information

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