



ADV

The Wealth Management Cryptocurrency

Presented by ADVISORBID

ADVISORBID

THE WEALTH MANAGEMENT NETWORK

The 1st XRPL Marketplace of NFTs based on relationships between financial advisors, wealth management firms, and investors.



AdvisorBid is creating a **link** between **wealth management firms**, **financial advisors**, **investors** and **Blockchain** to mint, buy, sell and transition books of business using **ADV** and **XRP** cryptocurrencies.

NFTs & THE FUTURE OF WEALTH MANAGEMENT

AdvisorBid is pioneering the future of the industry.

Transition



Advisors can express interest to transition to companies in wealth management while simultaneously maintaining anonymity.

Buy



Acquire a book of business in wealth management that is actively for sale or discover advisors that do not yet have a succession plan in place.

Recruit



Recruit producing financial advisors to your Broker-Dealer, RIA, OSJ, Hybrid or Clearing Firm/Custodian and view a network of financial advisor activity.

Sell



Selling a wealth management business has now become time efficient with higher competition utilizing the latest technology to be heard.



“AdvisorBid is at the frontline with the utilization of Web3 by bridging the gap between financial services and the ambiguity of cryptocurrency. Thanks to Ripple and the XRP Ledger, we now have the capability to transact wealth management books of business as NFTs on the blockchain, catapulting the adoption of cryptocurrency by those who manage the assets.”

Amy Rivera - CMO & Co-Founder, AdvisorBid & ADV

U.S. Wealth Management Industry Stats

PRODUCING ADVISORS

300K

COMPANIES

40K

INSURANCE AGENTS

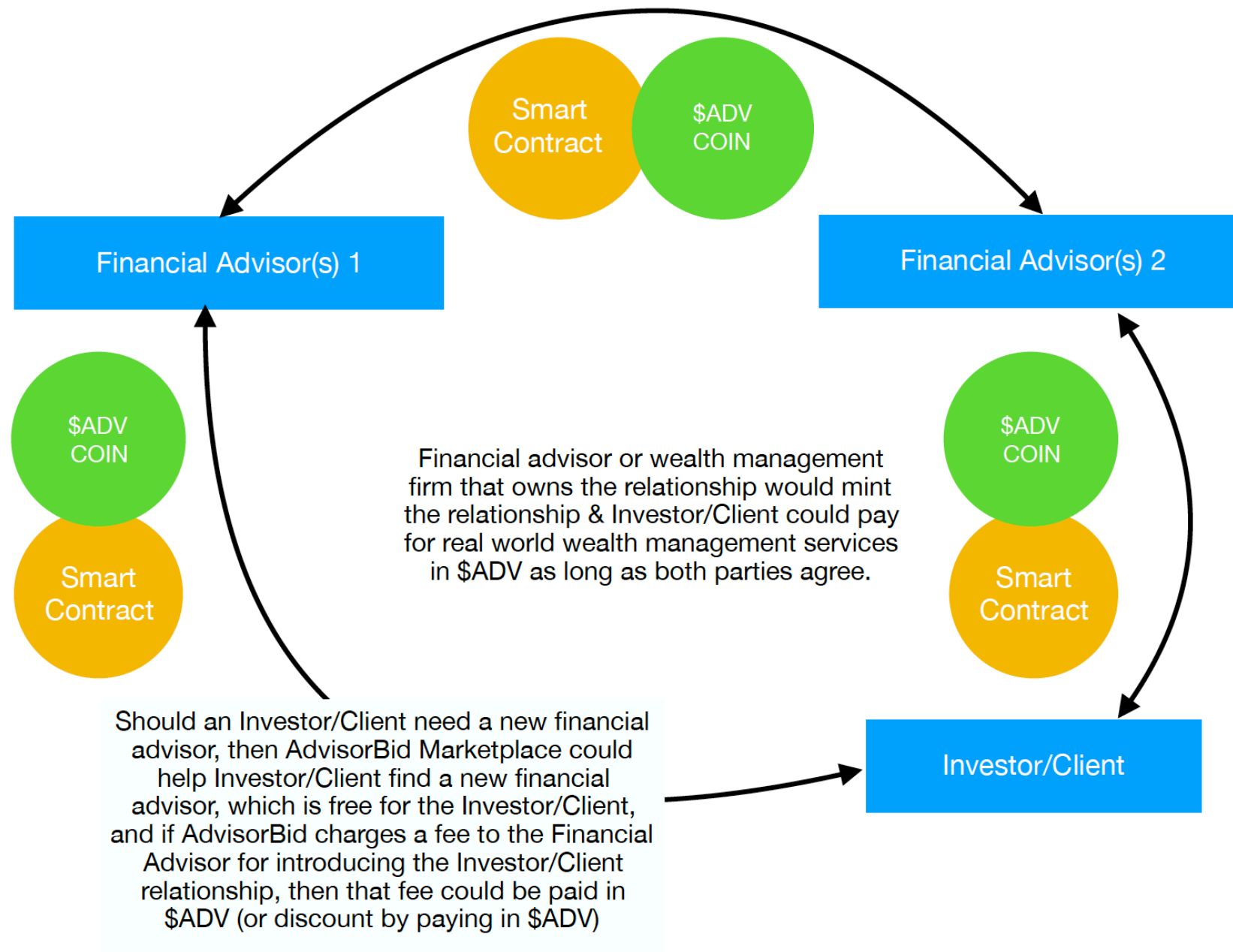
1.2M



\$ADV NETWORK FLOW

One cryptocurrency to represent the entire wealth management industry

Financial Advisor(s) 1 —> or a wealth management firm 1 would use a smart contract on the Blockchain and \$ADV coin to buy, sell and transition client relationships with Financial Advisor(s) 2 —> or wealth management firm 2



HOW BIG IS THE ASSET MANAGEMENT INDUSTRY?

Over \$100 Trillion in the United States.



\$100T+

How big is the asset management industry in the US? 

Despite economic uncertainties rising from the pandemic, the asset management industry has surpassed the centi-trillion mark to reach **\$103 trillion in assets** under management at the end of 2020, an increase of 11 percent from the previous year, according to Boston Consulting Group's annual report on the industry ... Jul 8, 2021

<https://www.institutionalinvestor.com> › article › The-Asset...

The Asset Management Industry Has Surpassed \$100 Trillion



"We've successfully recruited new advisors with AdvisorBid's Network. Their team is energized and engaged in the process from start to finish."

Shannon Spotswood - President at RFG Advisory



U.S. INSURANCE INDUSTRY NET PREMIUMS

Over \$1.2 Trillion in the United States.



\$1.2T+

\$1.28 trillion

Insurance industry at-a-glance

U.S. insurance industry net premiums **written totaled \$1.28 trillion in 2020**, with premiums recorded by property/casualty (P/C) insurers accounting for 51 percent, and premiums by life/annuity insurers accounting for 49 percent, according to S&P Global Market Intelligence.



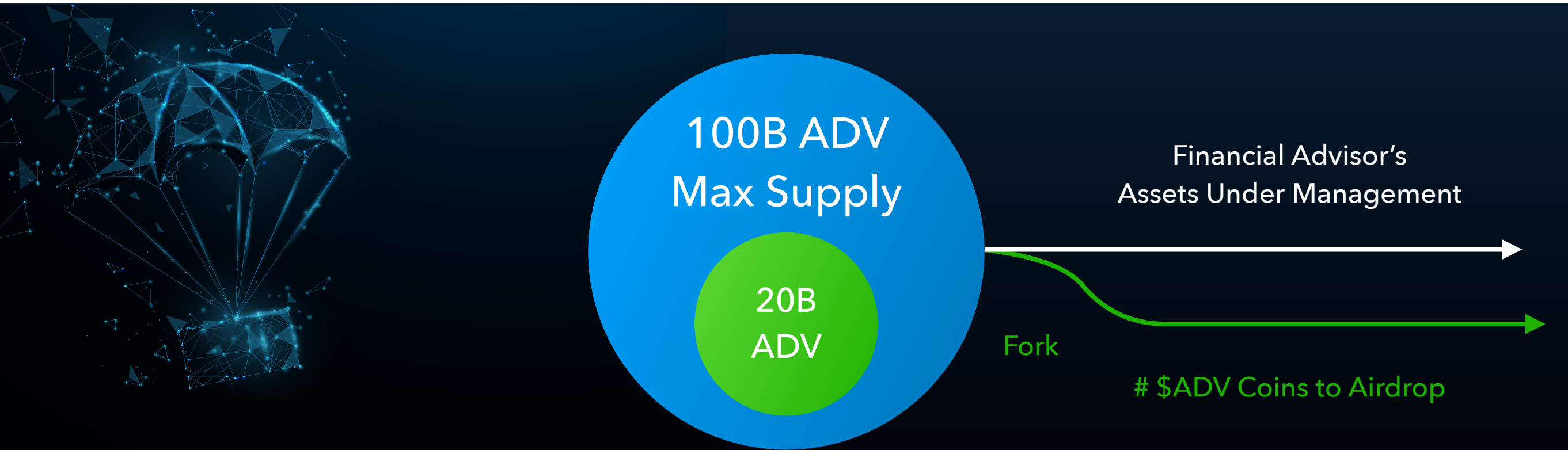
"What do you get when you combine financial advisors, Blockchain, crypto, and succession planning/acquisition? You get AdvisorBid."

Ross Marino, CFP®, CeFT® - Financial Planner & Founder at Transitus Wealth Partners



\$ADV TOKENOMICS

Up to 1/5 of supply reserved to reward industry based on value/production.



1000 ADV per \$5mm verified AUM



"The fact that there is no MLS (Multiple Listing Service) for FA's is a bit shocking to me. There are many FA's who will be transitioning their businesses to another generation over the next decade, and the current market for matching buyers and sellers is inefficient. I believe that a cryptocurrency that is based on the production of advisors can provide a basis for conversation, measurement of valuations, and eventual exchange of compensation for the acquisition and disposition of FA practices in the U.S. (and potentially globally.) "

Tim Clairmont CFP®, MSFS™ - President & CEO at Clear Financial Partners

PROBLEM 1 - BROKER PROTOCOL

Broker Dealer Protocol May Prohibit Taking Clients With You

The original broker protocol was an agreement signed by UBS, Merrill Lynch and Smith Barney in August of 2004. It was then later agreed to by other banks, and the framework has been adopted by most wealth management firms as an ethical transition strategy.

Prior to the broker protocol, financial advisors could freely share their new affiliation with their current clients, however, with the broker dealer protocol, that now prevents and may even limit the contact that an advisor may have with their clients.

Taking client information from a financial advisor's current employer could also be a SEC violation. Regulation S-P, implemented in 2003 outlines some strict guidelines and penalties regarding client privacy. If the data is owned by the financial advisor's employer, the advisor may be subject to this rule.

Contact Information That's Allowed By The Broker Protocol

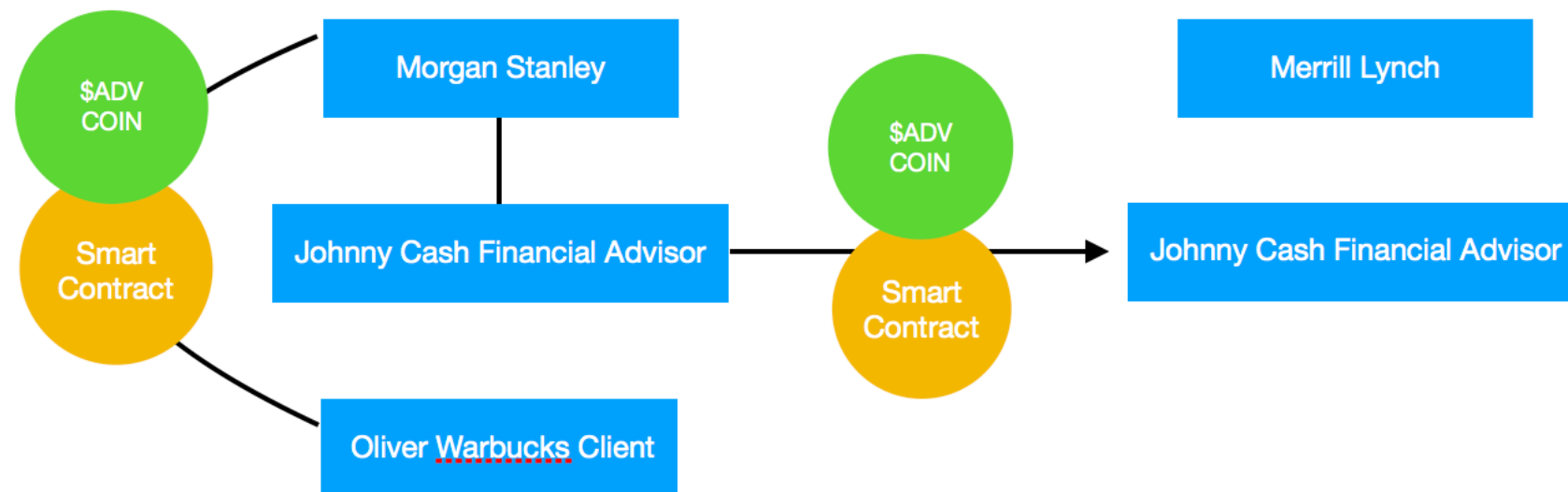
Financial advisor's client relationships may technically be "owned" by the bank or wealth management firm they're employed by, but the advisor was servicing the clients. Therefore under the broker protocol, the financial advisor is allowed to take the following when they leave their current employer:

1. Name
2. Address
3. Phone Number
4. Email
5. Account Titles

This list does not include data that would require specific client consent such as account information, balances, performance, history, or personally identifiable information such as social security numbers or EIN numbers, which fall under SEC privacy guidelines.



SOLUTION 1 - \$ADV PROTOCOL EXAMPLE



Working on ability to Mint, Buy, Sell and Transition Wealth Management NFT Client Relationships on the Blockchain Using '\$ADV' Coin

GOAL: NO MORE LITIGATION FROM FINANCIAL ADVISOR TRANSITIONS OR THE BROKER PROTOCOL

Example: As Johnny Cash changes his affiliation, Oliver Warbucks will automatically send him a real time push notification requesting the following: "Would like to continue doing business with Morgan Stanley (leaving firm) or John Cash (Financial Advisor)?" (with logo/avatar that goes to each AdvisorBid profile and information). Now there is no need for the financial advisor to contact clients when moving. AdvisorBid could simultaneously accomplish this for all parties on the Blockchain.



"If you're an advisor and you don't necessarily want a sales pitch from a recruiter but you're just looking to learn more about what the options are, AdvisorBid gives you the ability to do that. And you can do it on your own time. The time really is perfect for digital recruiting to just explode!"

Marc Butler - President & COO at Skience

PROBLEM 2 - DO-IT-YOURSELF INVESTORS

Many do-it-yourself investors and cryptocurrency investors do not have a financial advisor or do not initially think they need one, even though there are so many ways financial advisors can help investors:

Investment Management	Social Security Planning
Insurance Planning	Retirement Planning
Alternative Investments	Employee Retirement Accounts
Financial Planning	Estate Planning
Investment Consulting	Raising Capital or Debt
College Planning	Digital Assets/Cryptocurrencies
Asset Allocation	Tax Loss Harvesting
Cross-Border Planning	Option Trading
Personal Lending	Debt Management
Long-Term Care Planning	Investment Banking
Real Estate & Mortgage	Inheritance Planning
Advisory	Lottery Winnings Planning
Biblically Responsible Investing	+ many more



SOLUTION 2 - FIRST TIME CLIENT OF ADVISOR

With ADV, we are exploring the ability for financial advisors to accept 'ADV' Coin rather than USD from investors for financial advice, wealth management services, or a standardized monthly or annual subscription service that a financial advisor provides.

Advisors that are looking to acquire a book of business could now accept 'ADV' Coin as a form of payment for a subscription from investors, and then use that 'ADV' Coin to acquire a book of business.



"I believe that ADV has the potential to revolutionize the entire wealth management industry."

Danny Hewitt - Co-Founder Jackson Hewitt, Liberty Tax & New York Times Best Selling Author



PROBLEM 3 - BOOK OF BUSINESS LIQUIDITY

Industry's Problem:

When looking for liquidity, advisors can sometimes find it time consuming and cumbersome to find liquidity within their book of business. Everything is for sale by owner (to a certain degree), and visibility of the advisor's interest in selling their book of business is low. This limits competition and market value because the general market in wealth management does not know it even exists.

Our Solution:

AdvisorBid helps by introducing a fresh new concept of **minting, buying, selling** and **transitioning** wealth management and financial services relationships on the Blockchain as a NFT with 'ADV' Coin.

AdvisorBid Marketplace Stats

USERS W/ UNIQUE EMAILS

405K+

BUYING ADVISORS

600+

COMPANIES CLAIMED

1 K+



SOLUTION 3 - NFT 'COLLECTIONS' OF CLIENTS

Is the client/investor relationship with their financial advisor or wealth management firm a unique relationship that is one of a kind? Yes. Therefore, it can be minted as a NFT on the blockchain. In the future, RIA aggregators and buying advisors will be able to build collections of NFT wealth management book of businesses utilizing the XRPL.



"The question is not whether or not wealth management M&A deals will ever transact with crypto over the next decade rather than USD. The question is which crypto will be used for the transaction."

Brandon Spottswood - CEO of AdvisorBid & ADV

\$10 TRILLION

ASSETS UNDER MANAGEMENT ARE PROJECTED
TO BE ACQUIRED IN THE NEXT DECADE*

*According to Cerulli Associates, a leading wealth management market intelligence company



VISIONARIES COLLABORATING

The pioneers in the future of financial services.



Brandon Spottswood
CEO & Founder



Amy Rivera
CMO & Co-Founder



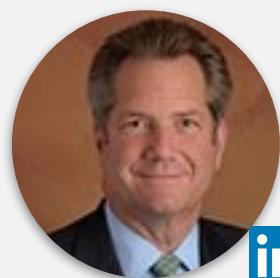
Danny Hewitt
Early Investor*



Shannon Spotswood
Advisory Board



Jim Silbernagel
Advisory Board + Investor*



Mark Zielinski
Early Investor*



Marc Butler
Advisory Board + Investor*

Brandon Spottswood Founder & CEO of AdvisorBid & ADV.

Amy Rivera Co-Founder & CMO of AdvisorBid & ADV.

Danny Hewitt of Jackson Hewitt and Liberty Tax, early AdvisorBid and ADV Investor, and New York Times Best Selling Author.

Shannon Spotswood named "Top 25 Women to Watch" by *InvestmentNews* and President at RFG Advisory.

Jim Silbernagel Top Financial Advisor, Founder & Host of Real Wealth Media, and Chair at MDRT Foundation

Mark Zielinski former Managing Director at Wells Fargo, Morgan Stanley, UBS, and Piper Jaffray.

Marc Butler currently President at Skience, Former Chief Operating Officer at BNY Mellon Albridge.



THE WEALTH MANAGEMENT NETWORK

Good news travels fast.

RIAintel

Wealth
Management.com

FINANCIAL ADVISOR
FA

ThinkAdvisor

benzinga

FINANCIAL
ADVISOR

IQ

Will AdvisorBid Be The 'Facebook' of Wealth Management?

AdvisorBid Launches Public Profiles For Every RIA

Skyrocketing Demand to Recruit or Acquire an Advisor's Business

Find Your Perfect Match With AdvisorBid's Marketplace for Financial Advisors

It's Not AdvisorBid I Believe In, It's Brandon Spottswood

New AdvisorBid Feature Delivers 'Transparency That Everyone Wanted By No One Had'

As Pandemic Chills The Economy, This Social Platform For Advisors Heated Up

Amazon-Like Star Rating and Comments for FAs, Firms, Investment Products



"AdvisorBid is light years ahead of the competition."

Louis Hanna - Financial Services Executive



TRUSTLINE ‘ADV’ COIN TODAY

Download a DeFi Wallet like XUMM from the App Store. Deposit XRP to set up XUMM DeFi Wallet. If you do not yet own XRP, you can purchase in the U.S. from Uphold and Bittrue if you're in the U.S.*

SET ADV TRUSTLINE at bit.ly/advtrustline Or go to: <https://xrpl.services/tokens> SEARCH='ADV'
Or Click the bull logo below:



ADV XRPL ADDRESS: [rPneN8WPHZJaMT9pF4Ynyyq4pZZZSeTuHu](https://xrpl.org/address.html?address=rPneN8WPHZJaMT9pF4Ynyyq4pZZZSeTuHu)

ADV/XRP available at: <https://sologenic.org/trade?market=ADV%2BrPneN8WPHZJaMT9pF4Ynyyq4pZZZSeTuHu%2FXRP&network=mainnet>




ADV/USDT available at: https://www.bittrue.com/trade/adv_usdt

XRPL Leaderboard at: <https://xpmarket.io/>

LiveCoinWatch at: <https://www.livecoinwatch.com/price/AdvisorBid-ADV>



KEY DIFFERENCES IN LEADING CRYPTOS

			
Symbol	XRP	BTC	ETH
Algorithm	Consensus	Proof-of-work	Proof-of-work*
Transactions per second	1500	~10	12-25*
Transaction cost (USD)	~\$0.0002 /tx	~\$1.34 /tx	~\$16.75 /tx
Transaction speed	~3-5 seconds	~600 seconds	15 seconds - 5 minutes
Maximum supply	100 billion	21 million	No supply cap
Mining capability	No	Yes	Yes
Smallest unit	Drop	Satoshi	Wei
Energy Consumption	~0.0079 kWh	~\$0.05 kWh	~0.667 kWh



DISCLAIMER

This presentation has been prepared by AdvisorBid (the “Company”) and is general background information about the Company’s activities at the date of this presentation. The information in this presentation is provided in summary form only and does not purport to be complete. This presentation does not contain all the information that is or may be material to investors or potential investors and should not be considered as advice or a recommendation to investors or potential investors in respect of the holding, purchasing or selling of securities or other financial instruments and does not take into account any investor’s particular objectives, financial situation or needs. By attending the presentation or by reading the presentation slides you agree to be bound as follows:

This presentation has been made to you solely for information purposes. This presentation may be amended and supplemented as the Company sees fit, may not be relied upon for the purpose of entering into any transaction and should not be construed as, nor be relied on in connection with, any offer or invitation to purchase or subscribe for, underwrite or otherwise acquire, hold or dispose of any securities of the Company, and shall not be regarded as a recommendation in relation to any such transaction whatsoever. The contents of this presentation should not be considered to be legal, tax, investment or other advice, and any investor or prospective investor considering the purchase of \$ADV should consult with its own counsel and advisers as to all legal, tax, regulatory, financial and related matters concerning an investment in \$ADV and as to their suitability for such investor or prospective investor. \$ADV is not a security and is a crowd sell cryptocurrency that is not regulated by the Securities and Exchange Commission (SEC). If an investor participates in an investment in \$ADV cryptocurrency, there is no expectation or implied expectation of profits or revenues of Company.

The communication of this presentation may be restricted by law; it is not intended for distribution to, or use by any person in, any jurisdiction where such distribution or use would be contrary to local law or regulation. This presentation is not directed to or intended for distribution, or transfer, either directly or indirectly to, or use by, any person or entity that is a citizen or resident or located in any locality, state, country or other jurisdiction where such distribution, transfer, publication, availability or use would be contrary to law or regulation or which would require any registration or licensing within such jurisdiction.

This presentation contains forward-looking statements. These statements may include the words “believe”, “expect”, “anticipate”, “intend”, “plan”, “estimate”, “project”, “will”, “may”, “targeting” and similar expressions as well as statements other than statements of historical facts including, without limitation, those regarding the financial position, business strategy, plans, targets and objectives of the management of the Company for future operations (including development plans and objectives). Such forward-looking statements involve known and unknown risks, uncertainties and other important factors which may affect the Company's ability to implement and achieve the economic and monetary policies, budgetary plans, fiscal guidelines and other development benchmarks set out in such forward-looking statements and which may cause actual results, performance or achievements to be materially different from future results, performance or achievements expressed or implied by such forward-looking statements. Such forward-looking statements are based on numerous assumptions regarding the Company’s present and future policies and plans and the environment in which the Company will operate in the future. Furthermore, certain forward-looking statements are based on assumptions or future events which may not prove to be accurate, and no reliance whatsoever should be placed on any forward-looking statements in this presentation. The forward-looking statements in this presentation speak only as of the date of this presentation, and the Company expressly disclaims to the fullest extent permitted by law any obligation or undertaking to disseminate any updates or revisions to any forward-looking statements contained herein to reflect any change in expectations with regard thereto or any change in events, conditions or circumstances on which any such statements are based. Nothing in the foregoing is intended to or shall exclude any liability for, or remedy in respect of, fraudulent misrepresentation.

The information in this presentation has not been independently verified. No representation or warranty, express or implied, is made as to the fairness, accuracy or completeness of the presentation and the information contained herein and no reliance should be placed on it. Information in this presentation (including market data and statistical information) has been obtained from various sources (including third party sources) and the Company does not guarantee the accuracy or completeness of such information. All projections, valuations and statistical analyses are provided for information purposes only. They may be based on subjective assessments and assumptions and may use one among alternative methodologies that produce different results and to the extent they are based on historical information, any they should not be relied upon as an accurate prediction of future performance.

Any data in this presentation are solely for your information, as background to the Company and may not be relied upon for the purpose of entering into any transaction whatsoever. Any financial information set out in this presentation is based on certain important assumptions and adjustments and does not purport to represent what our results of operations are on an audited basis or actually will be in any future periods. Furthermore, no representation is made as to the reasonableness of the assumptions made in this presentation or the accuracy or completeness of any modeling, scenario analysis or back-testing. The information in this presentation is not intended to predict actual results and no assurances are given with respect thereto. None of the Company, its advisers, connected persons or any other person accepts any liability.

