

Overview

Weaving cutting-edge technology with a custom-built mechanism, Finetooth can help you find the right investors by collecting your information and analyzing it against third-party data to evaluate who is most effective to be in your pipeline.

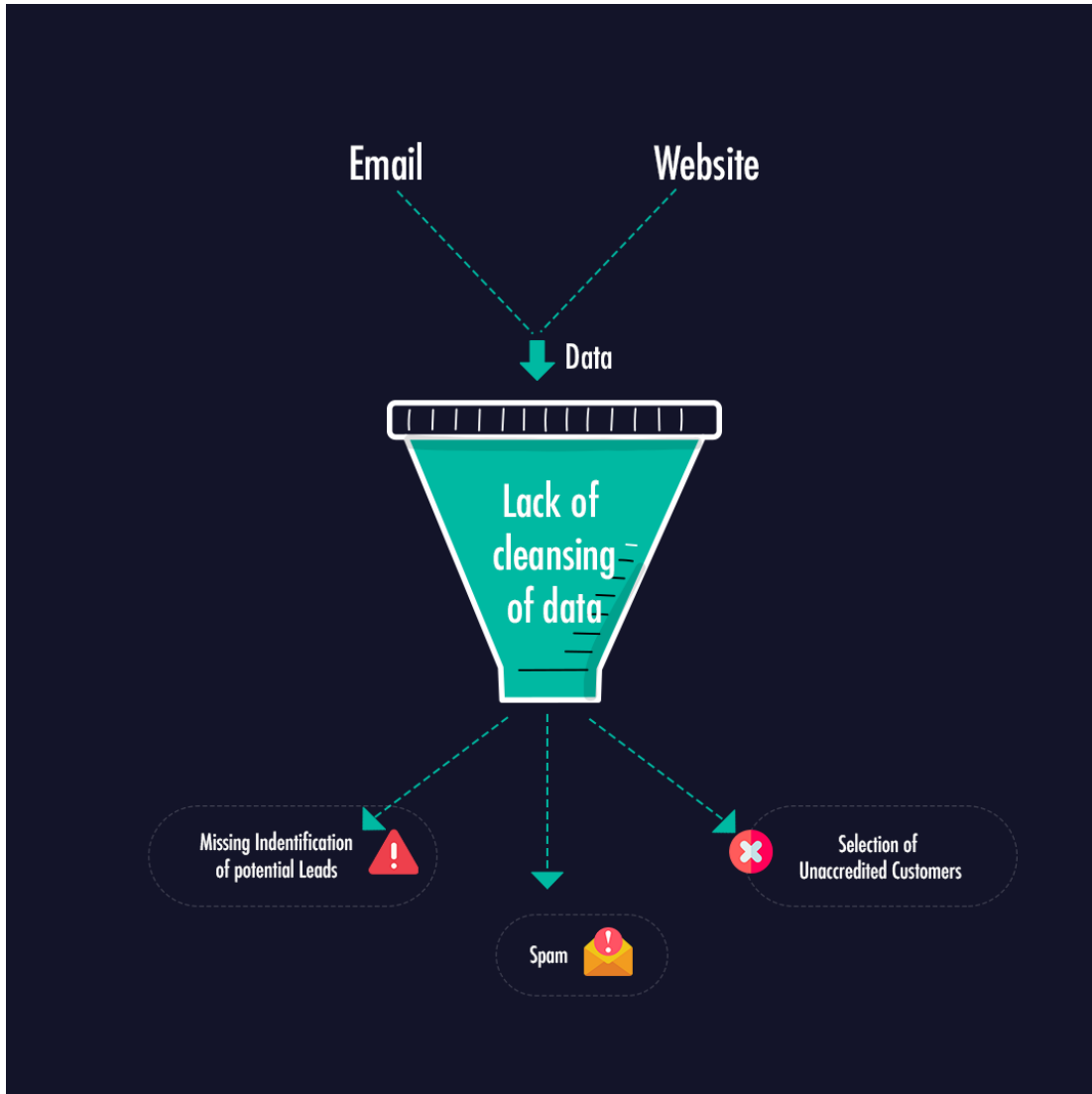
This proposal will reveal how we can understand the behavior, demographic and psychographic characteristics of Avistone's investor base. Finetooth will achieve this by employing an effective go-to-market strategy that discovers, qualifies, activates, and drives investments from relevant and ideal investors. Finetooth will collect valuable data through website optimization to identify and validate potential and high-value leads. This custom solution is designed specifically to achieve a significant ROI for Avistone.

The proposed solution is a battle-tested solution with historical returns greater than 200%. This solution is modified per your specific requirements, and it is designed specifically to bring results as quickly as possible.

The technology used in this solution is a blend of data engineering, machine learning, data science, and artificial intelligence.

Understanding the Business Challenges

The following diagram reveals gaps in Avistone's existing lead identification-to-qualification process. The current process prevents the company from effectively identifying and prioritizing high-value leads for each deal based on factors including investment criteria and interests, and the statistical probability to close.



Let's discuss these problems in detail:

- **Missing Efficacy:** Of the thousands of potential investors that exist in the database, Avistone has yet to prioritize these leads based on a wealth screening process from precise net worth and liquidity events to philanthropic habits and career insights.
- **Poor Efficiency:** Unable to drive relevancy and personalization at scale even after trying various techniques. This is indicative of infrequent data updates for each lead in the database. Finetooth rebuilds an entire dataset on a weekly basis and can sync with the CRM daily, ensuring Investor Relations is guided by lead prioritization and the most reliable information.
- **Email Deliverability & Spam Filters:** Unable to receive emails directly into the inbox. Email is sent to Promotion or Spam folders even after following best practices with managing email privacy and regulation laws regarding the collection and maintenance of the data.

- **Lack of Lead Discovery & Qualification:** Unable to identify true accredited investors and highest value accredited investors, and effectively reach them at scale with predictability.
- **Low Website Traffic:** The website backend recently underwent a major redesign. Even after SEO (Search Engine Optimization) best practices were put into place, Avistone has not yet been able to draw the desired traffic needed to increase lead performance. Finetooth can provide a predictable way to drive relevant paid traffic who resemble existing high-value investors in the form of lookalikes.

Need of the Hour

It's recommended that Avistone employs a solid strategy that not only resolves lead qualification issues but also incorporates automation to drive predictable sales performance:

- Boost ROI by increasing the average deal size for the company
- Discover the right target audience
- Convert leads into paying customers
- Utilizing the existing list of emails to strike a one-to-one conversation
- Hitting the hot spot of individuals through segmentation
- To run new resources in parallel with existing resources
- To prevent spamming and directly hitting the inbox
- To gather visitors' information through the sign-up process

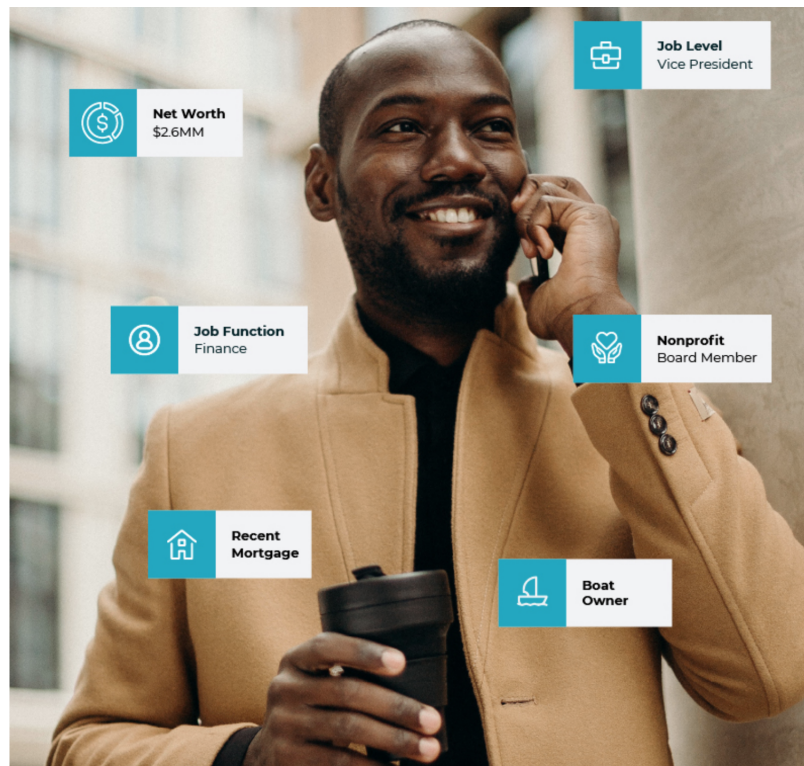
End to End Solution

The following is a bird's-eye view of the strategy Finetooth will use as a solution. It contains the necessary actions that are required to introduce qualification steps at later stages of the funnel. This ensures any potential lead matches the defined ideal investor profile Avistone has designated. The Investor Relations team will automatically give these leads the highest priority every time.

1. **Segment Investors:** Finetooth will employ a research-based archetypal representation of Avistone's investors. We will explore what investors seek to accomplish from their larger investment strategy, what goals drive their behavior, how they think, how they buy, and why they make buying decisions. We will discover where investors invest, including the behavior(s) that ultimately led to their decision to close on an investment.

Investor Segmentation will be an automatic process in which we will divide investors into specific investor profile groups based on demographic, psychographic, and behavioral characteristics. This automated process will automatically evolve with Avistone, as new intelligence on leads continues to develop recurrently. This feature will also enable Avistone to know how to pivot its marketing, sales and real estate investment strategy for any specific investor segment. From a novice to a saavy or "power investor", Avistone will know how to introduce relevancy and clarity for the investor as it considers their

investments. We will introduce insights that will inform Avistone's communication, content, and sales strategy for every scenario where an investment is being evaluated.



- 2. Track New Investor Profile Segments via AI-Based Lead Scoring:** Lead Scoring makes sales more efficient by focusing on the most promising investor leads first. Align marketing and IR by shortlisting which investors should be marked as priority based on the factors that make each “live” deal relevant for each investor based on their unique investment criteria and preferences.

[INSERT LEAD SCORING DIAGRAM]

- 3. Cut Email Deliverability and Performance Issues:** Finetooth will employ a number of server-side approaches (including IP address management) to ensure email is delivered to the right person at the right time, based on a number of different factors, including but not limited to: the email recipient's familiarity of the brand, a lead score based on the lead or investor's “appetite” to invest, and an overall “engagement” score.
- 4. Link the Most Relevant Deals to Each Qualified Lead In the Database:** Unique investment recommendations will be produced for each qualified lead. The AI recommendation engine takes into account demographics, investment criteria (risk tolerance, investment time horizon, investment goals and other preferences), previous investment behavior and Avistone's proprietary risk underwriting methodology.

In simple words, we will be able to target the most relevant leads for every deal currently in circulation or every upcoming deal forecasted based on the lead's interest(s) and investment goals.

- 5. Pinpoint Preferred Investors & Drive More Closings:** Pinpoint preferred leads and investors for each deal and provide relevant behavioral insights to best equip IR prior to the call. This efficiency will help the Investor Relations team prioritize leads and cut the average sale cycle length with predictability.

- 6. Cut the Average Sign Up to Invest Cycle:** Raise TOFU (top of the funnel) conversions (awareness to qualification) to drive qualified leads to their first investments as quickly as possible. Cut the average sales cycle for "known" leads and shorten the reinvestment cycle for all existing investors.

We are leveraging Data Science, Machine Learning, and Artificial Intelligence to solve these problems at hand. The whole strategy is divided into 3 phases. Let's discuss each phase in detail.

END TO END SOLUTION

■ Phase 1

Website Optimization



■ Phase 2

**Optimizing Email performance
and existing list of Email**



■ Phase 3

**Creation of Data Science
Process**

Phase 1: Website Optimization

WEBSITE *OPTIMIZATION*

Optimizing the Sign-up
Process



Collection of Data



Identification of
Potential Investors

We will begin by updating the website. Here we will introduce fields to the **sign-up process**. We will capture the data filled in those fields to identify who is accredited. We will also capture additional demographic details, investment criteria (risk tolerance, investment time horizon, investment goals and other preferences), and knowledge of their existing portfolio. With this level of granularity for future leads, we can proactively discover new insights and target the most effectively.

For investors who already exist in the database, we can use available data to collect 3rd party data that maps and confirms the identity of these prospective investors.

Phase 2: Optimize Email Deliverability

In this phase, we will analyze the entire email infrastructure to identify points of friction leading to poor email deliverability (promotion filters, spam filters and blacklists).

We will implement solutions to ensure email deliverability for all leads at each stage of the funnel. Here we will introduce new IP addresses specific to each investor segment, factoring their interests and behavior.

Emails will be sent using IP addresses based on varying factors analyzed by an engagement scoring model. This self-managed tool raises Avistone's email reputation for each email service provider (GMail, Exchange/Outlook.com, Yahoo! etc).



Moreover, we will cleanse all the verified emails. This will help us to know whether the database we are reaching is truly accredited. Finetooth will later divide them into various categories for research purposes, then classify them as high-value or low-value investors.

Phase 3: Build “Lookalikes” of Investors & Prioritize Leads per Deal

We will utilize user data to learn more about each segment of investors. This will help us gauge our ability to fish for lookalikes of existing investors on the open marketplace, thus shorten average sales cycles and produce a higher ROI.

We will look deep down into the historical performance of every user who has made transactions with you. Once that is done, we will analyze the characteristics of those users and create a threshold. This will provide us with a “sweet spot” for marking someone as a “high-value” investor. Avistone’s Investor Relations team will leverage this resource to prioritize their leads in their CRM. They will now they will have clarity on who is most likely going to invest at a given time based on the factors we will routinely evaluate.

Let’s understand this Data Science process through a flowchart:



We will begin by collecting your existing raw data from each of your lead and customer database(s). This will also include the incorporation of 3rd party wealth screening data that will be matched to the leads in your system. Once everything is collected, we will clean and process the data. We will give the data structure and make it easy for identification and data analysis.

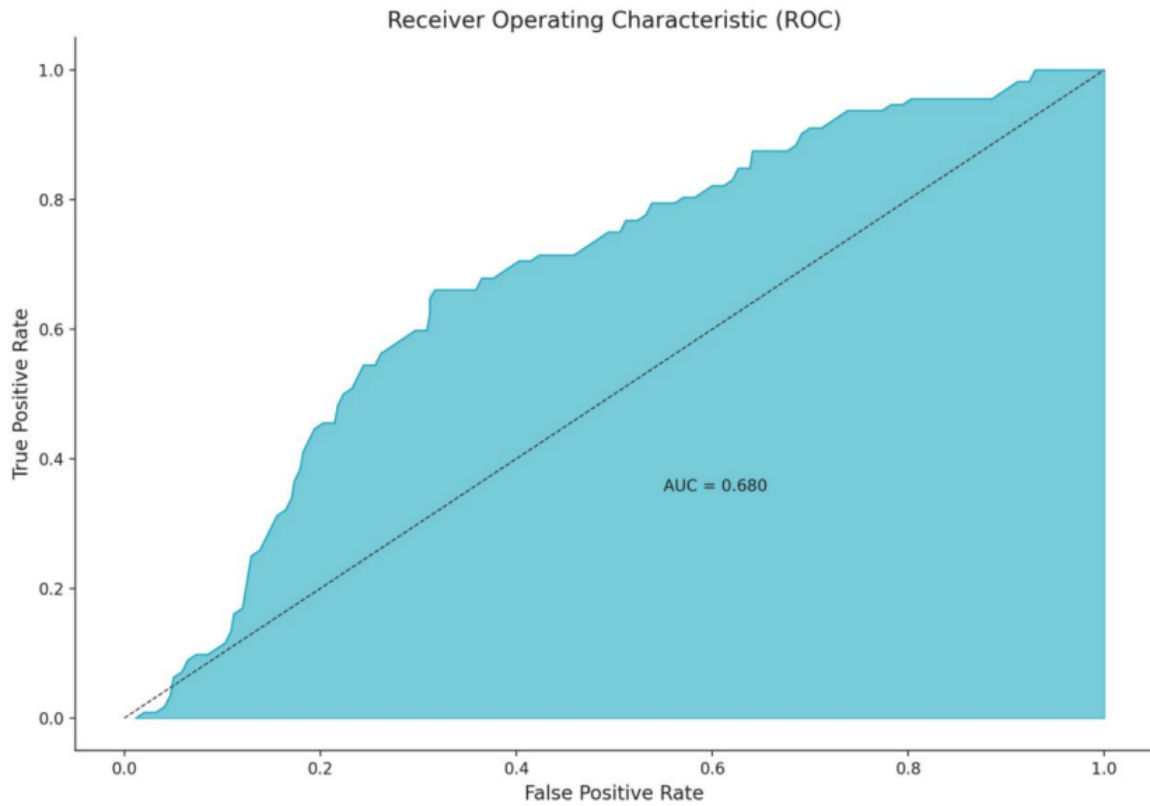
Next, we will explore the data. Here, *exploration* means looking at historical insights, pinpointing trends, and highlighting the similarities or anomalies we should be aware of specific to the context of Avistone’s sales process and overall business. After feedback has been given, these insights will then be transferred to the Models & Algorithms phase where the automatic

identification of the high-value investors will be carried on. Once identification is complete, all insights will be reported on for final implementation. At this time, specific insights and recommendations will be provided to Avistone to quickly produce a ROI for the Investor Relations team. This data will be plugged directly into the company's CRM for use by the IR team to prioritize leads.

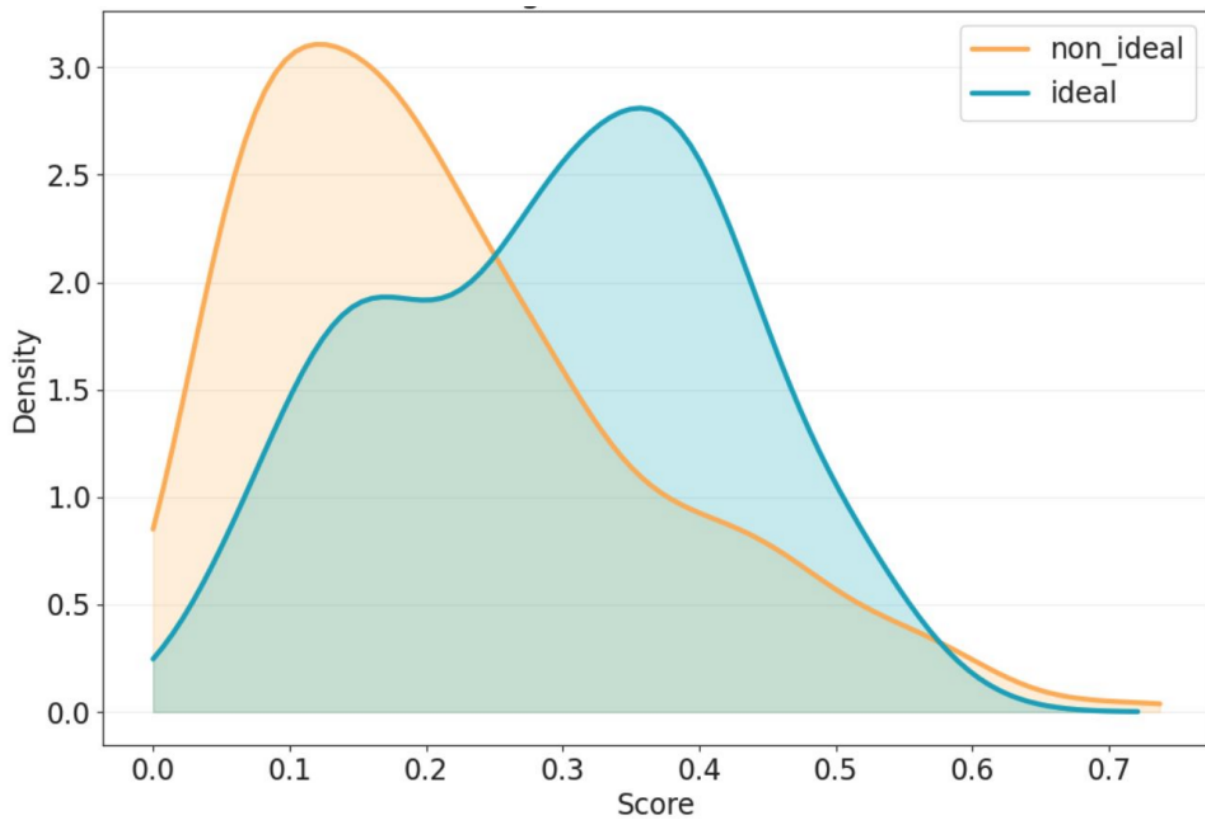
In the future, insights will be automatically produced and shared via this mechanism. This includes recommendations for specific deals as they become available. The good thing about this automatic process is that there will be no need for any manual instructions.

Here is a detailed explanation of our data science process:

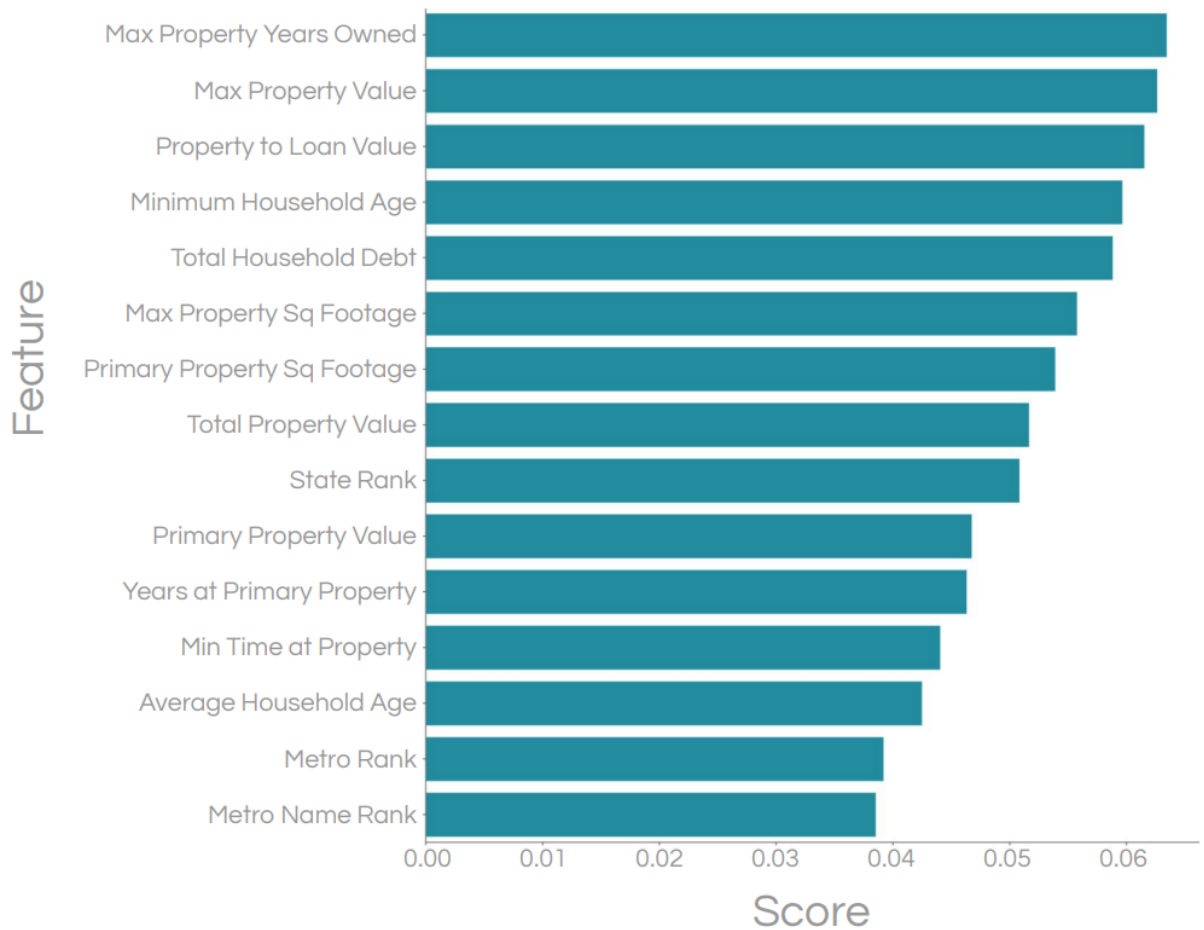
- 1. Evolution of Data Science Models - Record Classification:** Once the data is collected from Avistone and 3rd party wealth screening data, we will start analyzing the data using machine learning.
- 2. Classification and Model Structure:** Avistone will inform us of the medium to best case characteristics for each investor they work with. With this information, we will define a "sweet spot" grade based on the ideal investor profile score gleaned from anecdotal evidence. We will automatically identify leads meeting this threshold going forward along with a second model that determines best-fit using an approach that is agnostic from anecdotal evidence. This approach will utilize features of the investors and their behavior.
- 3. Stress-Test & Demonstrate the Strength of Each Models:** Once we have identified the right fit investors, we will confirm our accuracy using various stress-tests to ensure a battle-tested solution. One of the ways we will stress-test will be through the use of the under the curve model - a metric that lets us know how far we are On/Off in terms of accuracy:



- 4. Cross-Validation to Eliminate Bias from Models:** It can be difficult to identify the areas of bias that could potentially exist in the data. In order to tackle this, we will do a second round of stress-tests, including evaluating the normal distribution of the datasets to confirm whether all “ideal” investors share similarities in amongst the variables that make them an ideal “investor profile fit.”



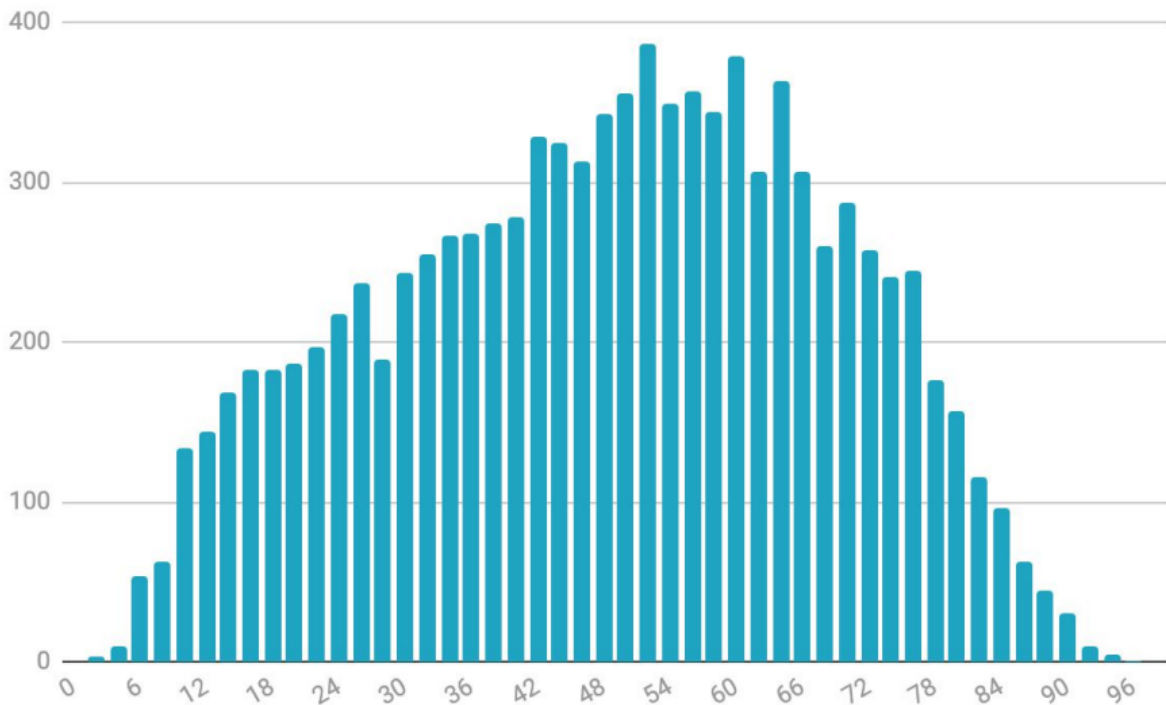
- 5. Double Check - Does Each Investor Feature Show a Consistent Story?** We will ensure that we are properly testing each investor feature to determine who is the right fit. It will let us know how viable the variables are that we are being used to surface accurate results every time with the incorporation of 3rd party data.



6. Prioritizing the Best Investors: After everything has been properly classified, Finetooth will get down to the nitty-gritty and prioritize who the best investors are based on 3rd party data and trends extracted from Avistone. We will create an algorithm that automatically surfaces the scale of right fit to not a right fit based on the results of the previous step.

Once the last process is complete, the median and the average scores will look like the chart below.

Note: *The chart below demonstrates the distribution of scores for the database.*



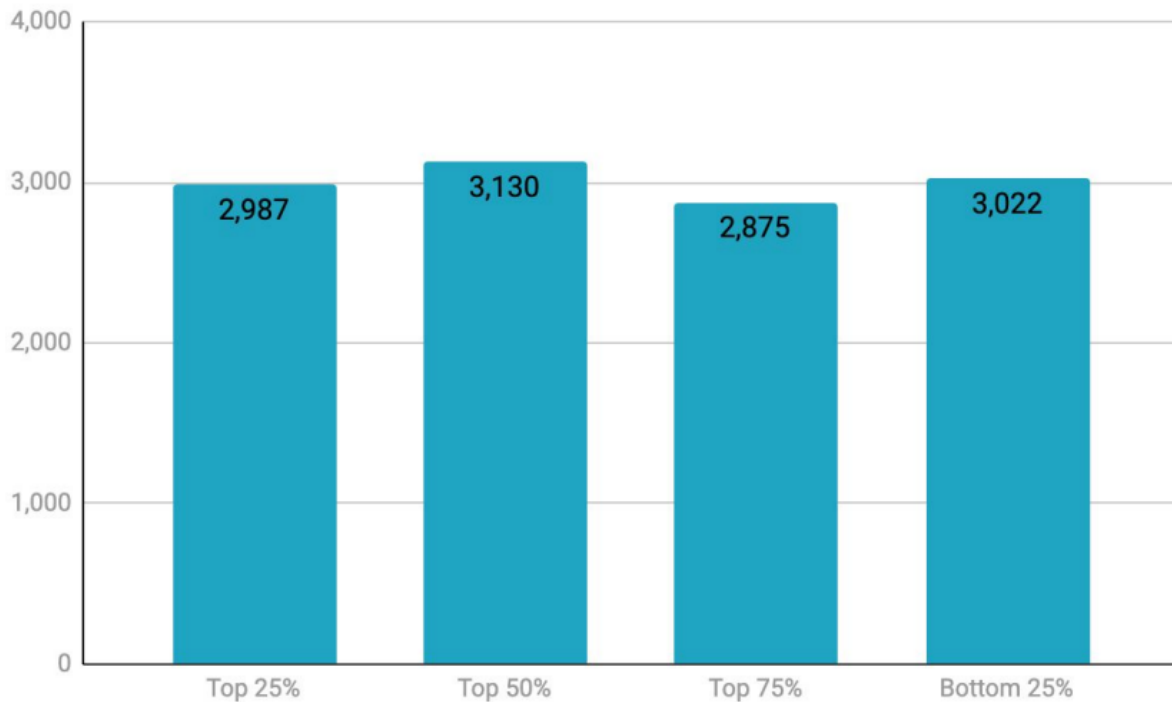
Final lead score as an output to the last action.

7. **Segmentation:** We will then segment different leads into different buckets so that we can now look at other data points we have about those users. If we know that certain users are in the top 50%, this means they are spending the most or most likely to spend the most. We will then look at their behavior on the platform (Avistone’s website in this case). We will see what type of content they are looking for on Avistone’s website, and which specific content pieces they are consuming the most.

For instance, as per the table below, we will divide the users into the following categories:

Percentage	Grade
Top 25%	A
Top 50%	B
Top 75%	C
Bottom 25%	D

Segment Distribution



This will provide us with valuable information that we can use to personalize emails or marketing automation specific to those users. Doing this will help us to reach those qualified leads quickly and effortlessly.

- 8. Recommendations:** After dividing the users into A, B, C, and D categories, we will utilize these lead grades across the entire marketing and Investor Relations workflow. So, if we have a right fit investor and we know specific data points about them, we can now identify how we can proactively go-to-market and sell to this qualified lead based on the characteristics of that lead, which we have collected and analyzed earlier.

Leverage Lead Grades & Triggers in Sales / Marketing Workflows

	Recommendation	Finetooth Customer Example
Provide to Sales / IR	<ul style="list-style-type: none"> ■ Prioritize 'A' Leads for proactive reach out 	<ul style="list-style-type: none"> ■ Private aviation company syncs lead data weekly and uses Lead Grades to prioritize correspondence ■ Finetooth designed Grades and built logic directly in CRM
Tailored Marketing Campaigns	<ul style="list-style-type: none"> ■ Use Trigger data to identify individuals more likely to invest in a specific asset (e.g., Real Estate Investor, Environmental Donor) 	<ul style="list-style-type: none"> ■ High-end online retailer used known trigger data to create audience for a high-priority product offering ■ Finetooth team developed custom logic based on generic opportunity identified by the customer
Remarketing	<ul style="list-style-type: none"> ■ Add 'A' Leads into remarketing campaigns to continue to expose them to offerings 	<ul style="list-style-type: none"> ■ Luxury hospitality company adds top-rated leads to its Facebook remarketing campaigns

9. Leverage Insights to Isolate Population: We will then classify the investors based on their net worth and/or other characteristics that are deemed most important to Avistone. We will look outside of your data to see what potential prospects we can bring into the company.

10. Isolating Populations on Trigger Data: As the third-party data become updated on a weekly basis, Avistone will be informed automatically about it. Furthermore, a campaign could be behaviorially triggered to automatically respond to investors proactively based on these updates.

For instance, if a non-multifamily owner becomes a multifamily owner, Investor Relations could be automatically notified of that change and automatically deploy a campaign to proactively respond to the investors who are in that situation.

Note: The data will be collected from step 9 where we have isolated the population on the basis of their net worth:

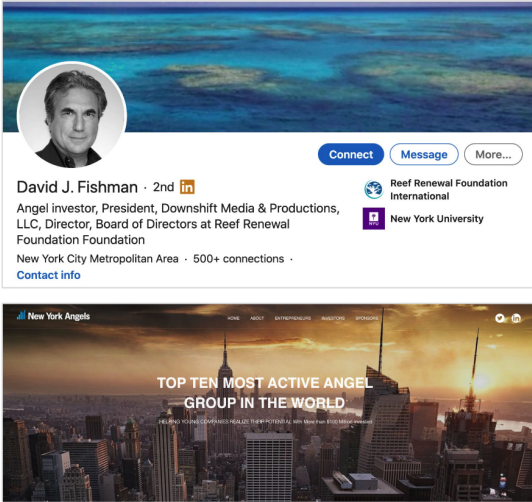
Net Worth Bin	Investors	Prospects	Investors	Prospects	Investors	Prospects
\$1M - \$2.5M	169	3,352	31.6%	29.2%	44.2%	49.6%
\$2.5M - \$5M	114	1,789	21.3%	15.6%	29.8%	26.5%
\$5M - \$10M	71	1,008	13.3%	8.8%	18.6%	14.9%
\$10M - \$20M	18	469	3.4%	4.1%	4.7%	6.9%
\$20M+	10	137	1.9%	1.2%	2.6%	2.0%
Total	382	6,755	71.5%	58.9%	100.0%	100.0%

Once we have analyzed the data using the above-mentioned process and identified the right investors, we would be able to search for those specific users on social media platforms such as

LinkedIn using to find out more information about them. Let's understand this through an **example**.

Once we have identified a qualified lead who is marked as "high value" to Investor Relations, we automatically know there is a high likelihood the investor would be of great value to Avistone. We multiply the value of this mechanism by utilizing social platforms like LinkedIn to gain additional insight about the investor and personalize outreach. This should be leveraged to collect context to further inform the IR team's GTM strategy for approaching high-value potential investors.

Example to Prioritize: David Fishman



Selected Finetooth Fields

Category	Investor Data
Net Worth	~\$16.7MM
Primary Property AVM	\$2.6MM
Lead Score	81
Multi Property Owner	Yes
Rental Property Owner	Yes
Investments Real Estate	Yes

Finetooth Commentary

- President, Downshift Media & Productions
- Angel Investor with New York Angels
- Previously a Senior Advisor at OpenGate Capital

Impact of Finetooth's Solutions on the Bottom Line

Over the years, Finetooth has helped a number of companies in not only gaining new leads but also converting those leads into repeat paying customers. Here's a glimpse of a project we worked on and the results from that project.

It all started with building an audience for a third party. We focused on building the digital audiences from February 1st, 2021, to March 22nd, 2021, and successfully generated **100+ leads, 21 new investors** (Invest/Multiply Stage), and **\$250K+ Investments**.

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