

For your Employees



Who we are

Life file, Digitized:

Canadian FinTech RattleHub is a start-up working towards simplifying access to important information for families through its centralised platform.

Vision

To empower people to leave a lasting legacy, while leaving loved ones with dignity and clarity

Mission

To radically change the social issue of poor estate planning using AI to predict next best product offers linked to gaps and risks

The Employee

More than half the world don't have a **protective plan or will** in place



... for those that do, Executors reported that:

71% never discussed the assets of the estate with the holder

42% unaware they were named

58% little to no awareness of the role

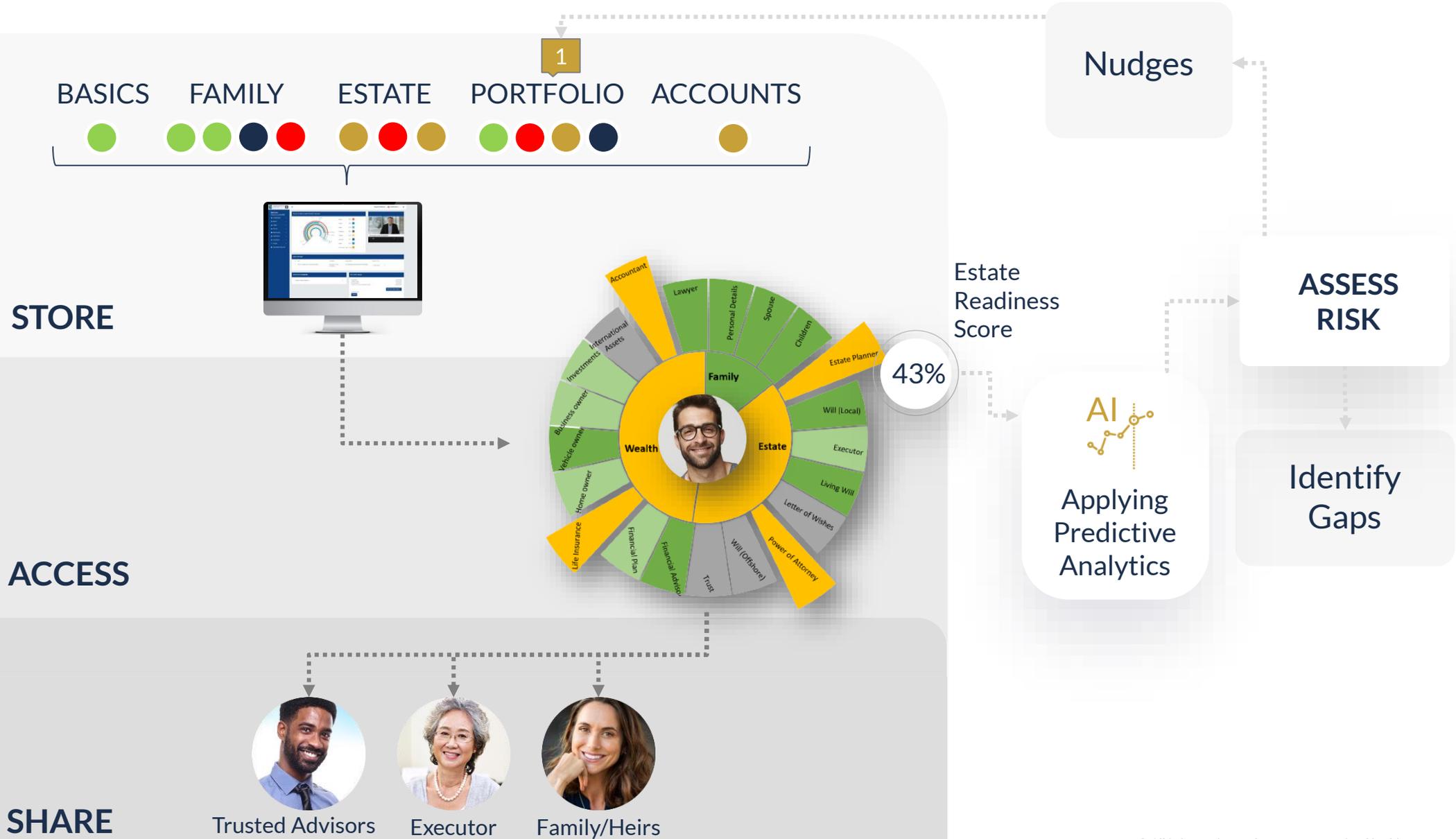
What is NEXTDOT



is a digital life file tool which guides your employees to capture, store and share the information that is important throughout their lives.



What is NEXTDOT



Benefits



Offering employees secure custody of their important information and connecting their family, advisors, executor and trusted network



Offer employees something new



Guide employees to capture the important information throughout their life journey



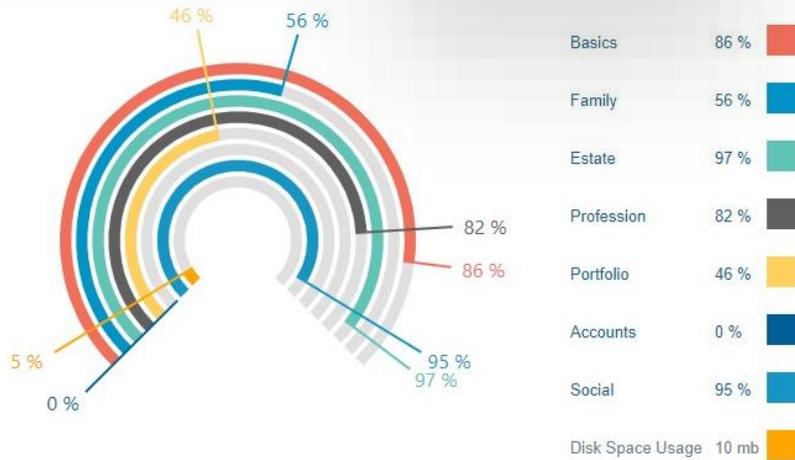
Share with loved ones and advisors, enabling access when they need it most



Peace of mind knowing your affairs are in order

Estate Readiness Tracker

PEACE OF MIND COMPLETENESS TRACKER



Life changes quickly. Be prepared.

0:00

Life file, Digitized

Timely messages educating and assisting client's life journey

MIND THE GAP

#	GAP	FOUND IN	QUICK READ	CONTACT YOU
1	Please complete your employment details	Profession > Work Information	The advantages of professional memberships	Please Select

Gaps & Opportunities identified

7 Main Structured Categories – this is where we connect the dots

IMPORTANT NUMBERS

- Search Important Numbers -

NET ASSET VALUE

Asset Value	5,080,000.00
Liabilities Value	4,450,000.00
Net Asset Value	630,000.00
Portfolio Cover and Contingency Value	5,500,000.00

Net Asset Value Report

Financial Plan

Upload

White Labelled Client Platform

As we connect the dots

Customer Journey



ENHANCE

- 2 Ryan gets married
- 3 Buys a house & takes out a mortgage
- 4 Ryan and his wife have a child
- 5 He updates his Will
- 6 He puts life insurance in place
- 7 Ryan starts investing



Online digital will

Estate Readiness

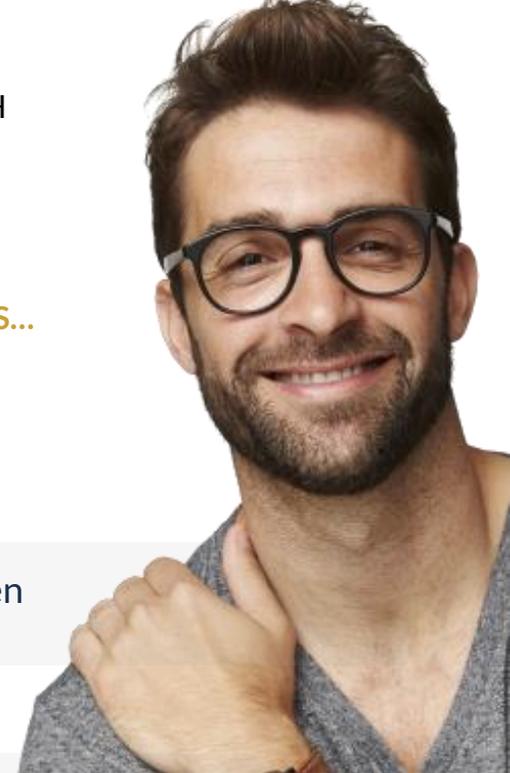


RYAN, 35
MARRIED WITH
CHILDREN

AS TIME PASSES...

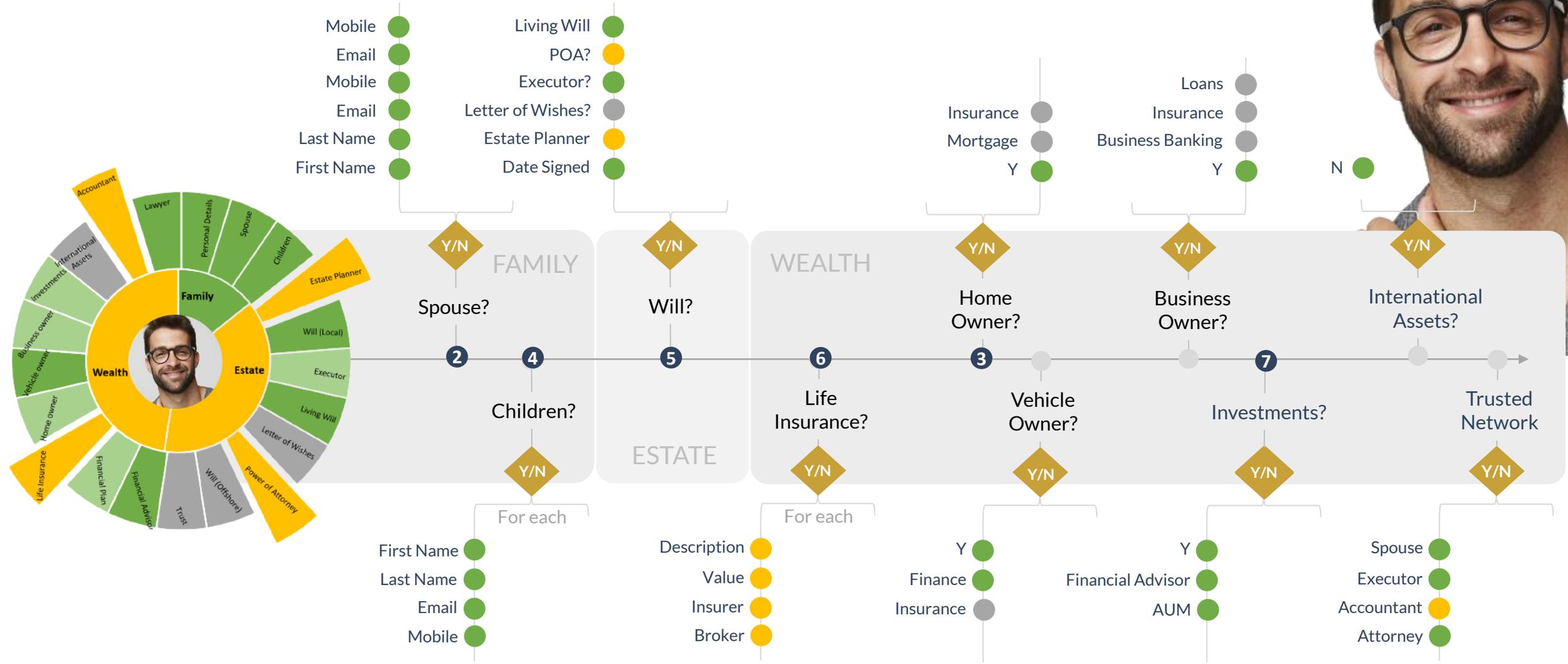
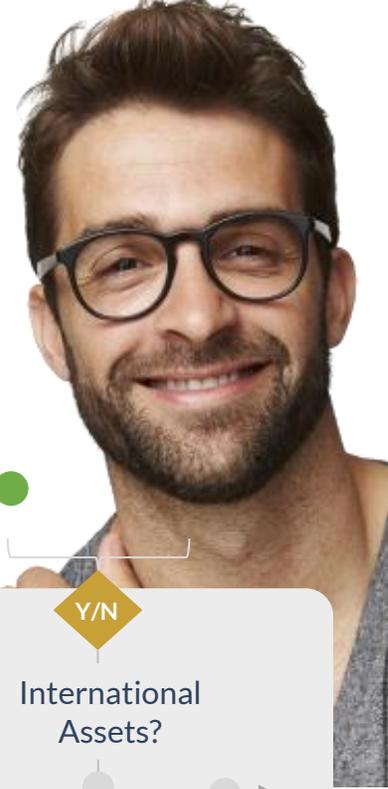
Digital will is updated when needed

Keep data relevant and up-to-date
Estate Readiness score linked to rewards
Keep a track on things based on data



As we connect the dots

Customer Journey



Customer Journey

→ ENHANCE

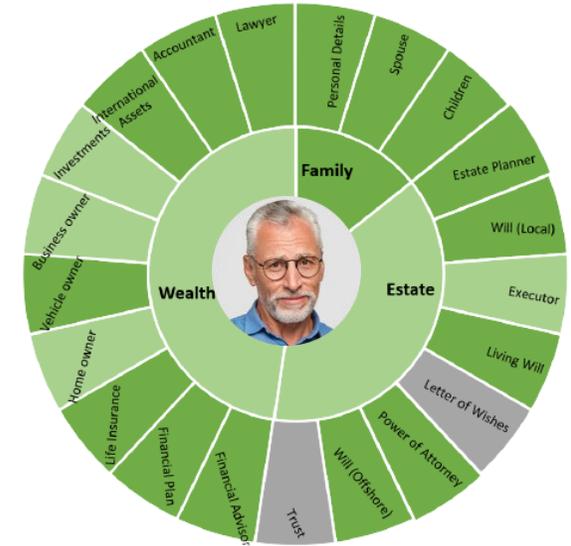
8 When Ryan passes away

Settling the estate

The benefits of an integrated platform to provide value to employees from cradle to grave



Access to will and information



Consolidate data required for Executor and estate administration
Expedite deceased estate process

NextDot provides detailed information to assist settling the estate

Milestones



Sept - Apr



May - Dec

2017

2018

2019

2020

2021

Dec

Feb

Feb

July

Aug

Jun

May



2018 Mar - 2020 Feb



Join our Mission

Thank You



Simplifying access to important information for families



Phone :
[+1 289 885 1773](tel:+12898851773)



E-mail :
greg@rattlehub.com
gary@rattlehub.com
siobhain@rattlehub.com



URL :
www.rattlehub.com

Gets married
***Gap Identified:**
Spouse requires new account

Buys a House
***Gap Identified:**
Insurance requirements

AUM Increase
***Gap Identified:**
Investment assistance

Will
***Gap Identified:**
Set up Will & Link Executor

