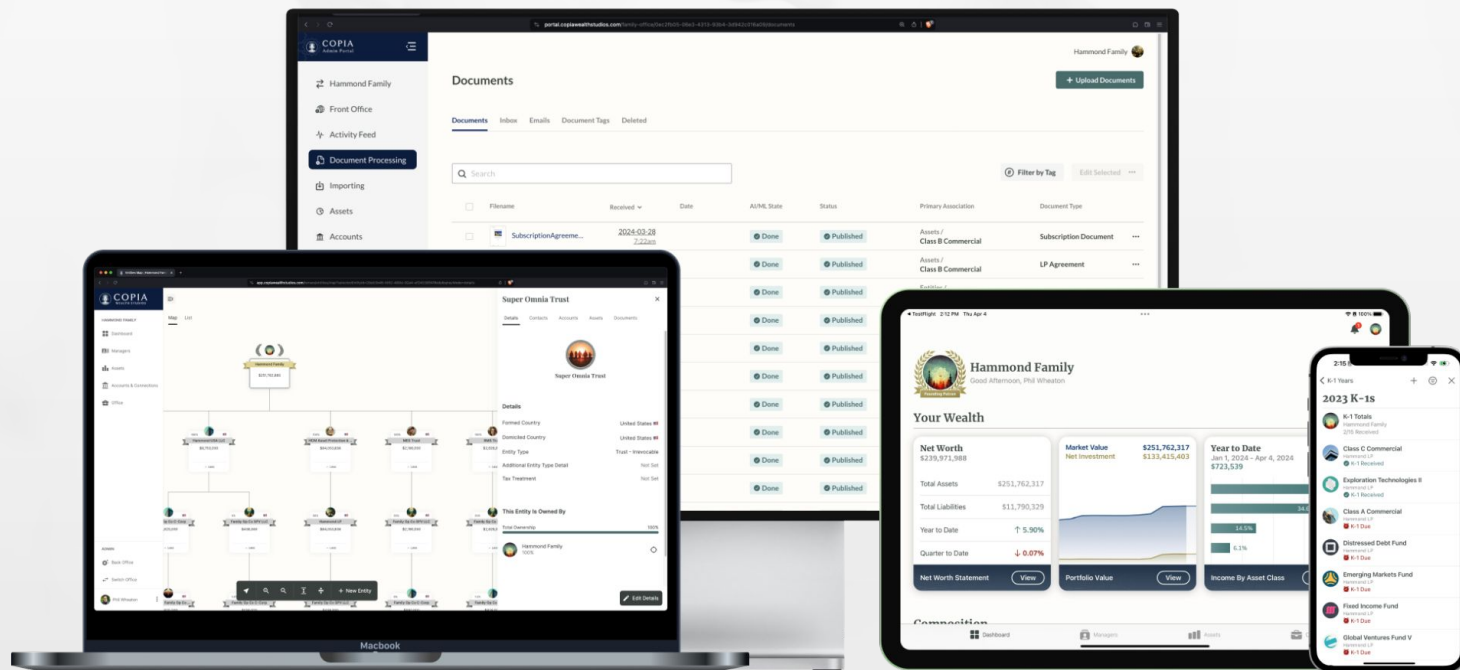




Copia Wealth Studios

2024 Platform Overview

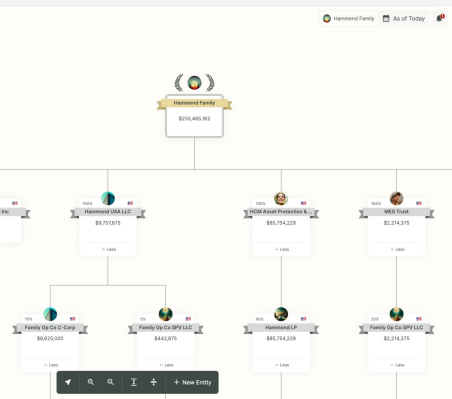
Put Your Assets Under Intelligence™



Copia is for

Single & Multi-Family Offices

Bring all your assets together and make better decisions about your allocations. Include family, educate next-gens, and get everyone read in.



The screenshot displays the 'Managers' dashboard, which lists various managers and their performance metrics. The table includes columns for Manager Name, Company, Class, Market Value, Net Investment, and Rating. The data is filtered by 'All Office Managers'.

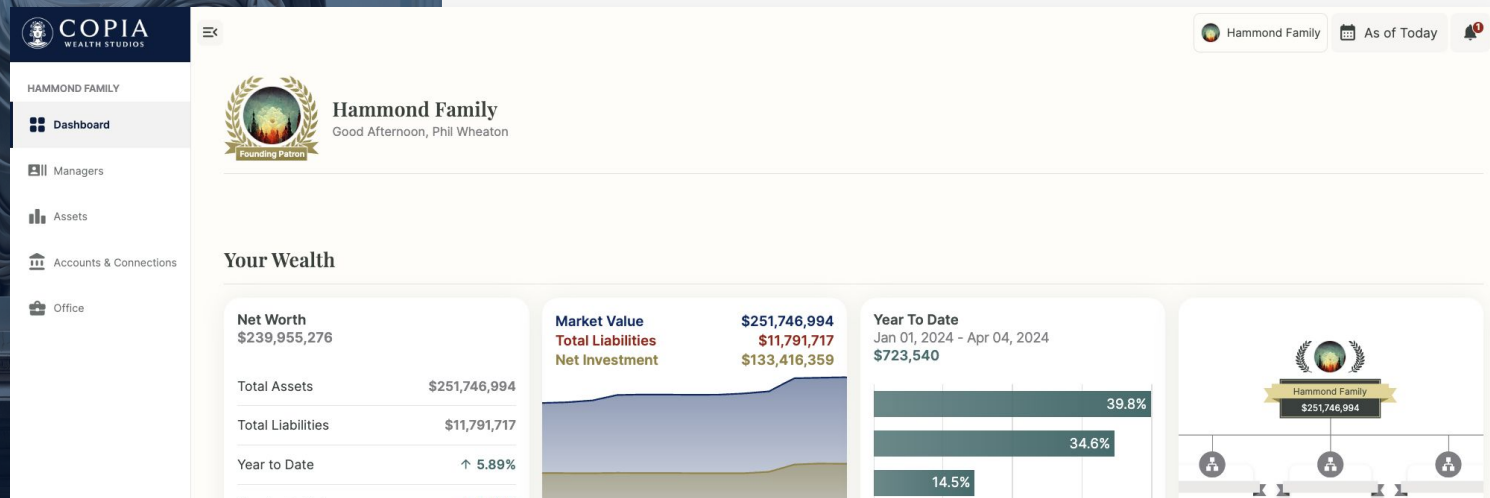
Manager Name	Company	Class	Market Value	Net Investment	Rating
Aarya Patel	Black Ventures	Venture Capital Funds	\$1,897,415	\$1,778,376	B
Al Hoffman	Commercial Real Estate	Mutiple	\$9,820,000	\$6,022,010	C
Boris Kuznetsov	Investment MGMT.	Foreign Equity	\$1,670,000	\$1,000,000	C
Dennis Johnson	Technology Venture Capital	Venture Capital Funds	\$11,400,000	\$4,000,000	B
Douglas Worthington	Global Investment Bank	Fixed Income & Debt - Funds	\$11,383,456	\$8,200,000	A
Harold Mao-Yong	New World Ventures	Venture Capital Funds	\$13,000,000	\$5,000,000	B
Jane Richardson	TMT Hedge Fund	Hedge Funds	\$29,850,000	\$10,000,000	B
Rachel Gonzalez	Multi Family Investments	Real Estate - Direct	\$13,512,000	\$8,398,300	A
Richard Cup	Risk Arbitrage Strategies	Hedge Funds	\$8,963,028	\$7,000,000	B
Self-Managed	Hammond Family Office	Mutiple	\$106,547,136	\$57,741,453	B
William Ferro	Private Equity Group	Private Equity Funds	\$47,922,127	\$26,124,362	B



Copia is for

RIAs

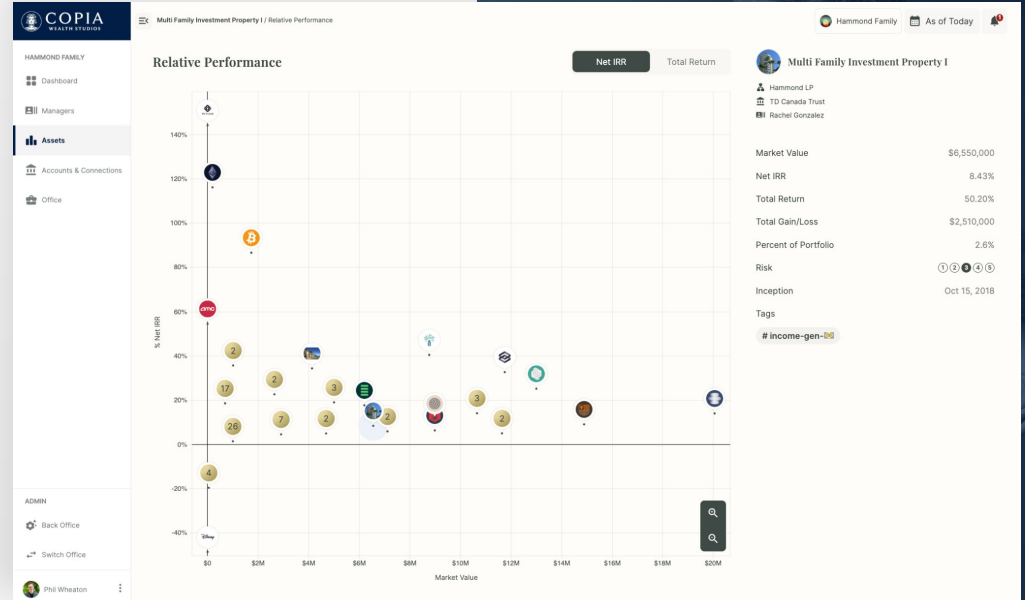
Report with confidence. Earn trust with powerful metrics and insights alongside a growing collection of lenses and modules.



Copia is for

Banks & Institutions

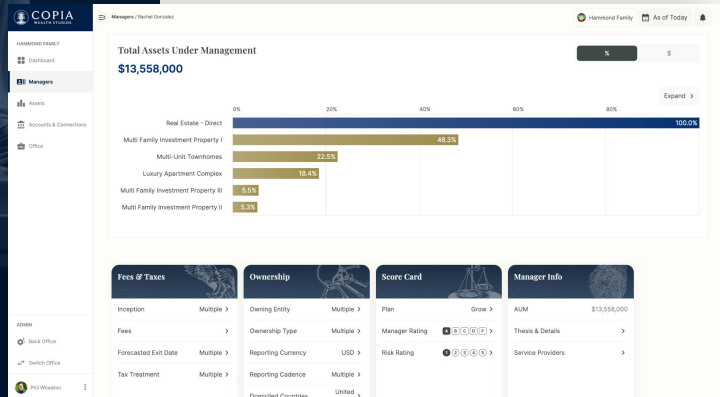
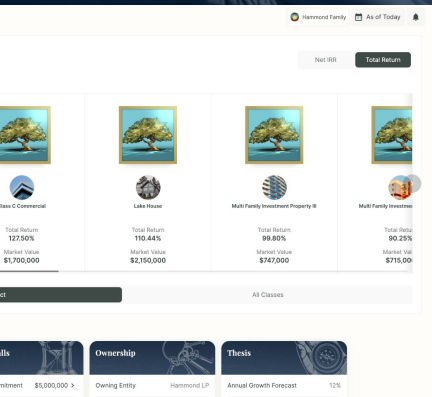
Deliver exceptional experiences for your clients and partners.
Strengthen relationships up and downstream with world-class tech.



Copia is for

Entrepreneurs & Leaders

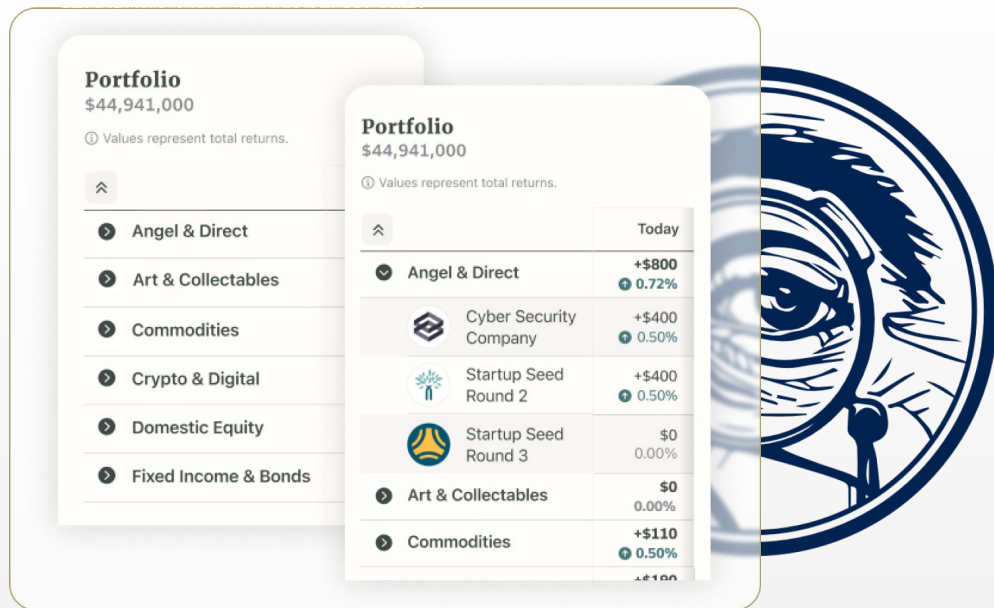
Act with confidence as you evolve from operator to allocator. Ditch spreadsheets and track performance across accounts, managers and alternatives from a single source of truth.



Copia helps you

Take Control of Capital Calls

Never be caught off guard again by rogue capital calls. Plan ahead, anticipate future calls, and track historic trends.



Copia helps you

Track Metrics That Matter

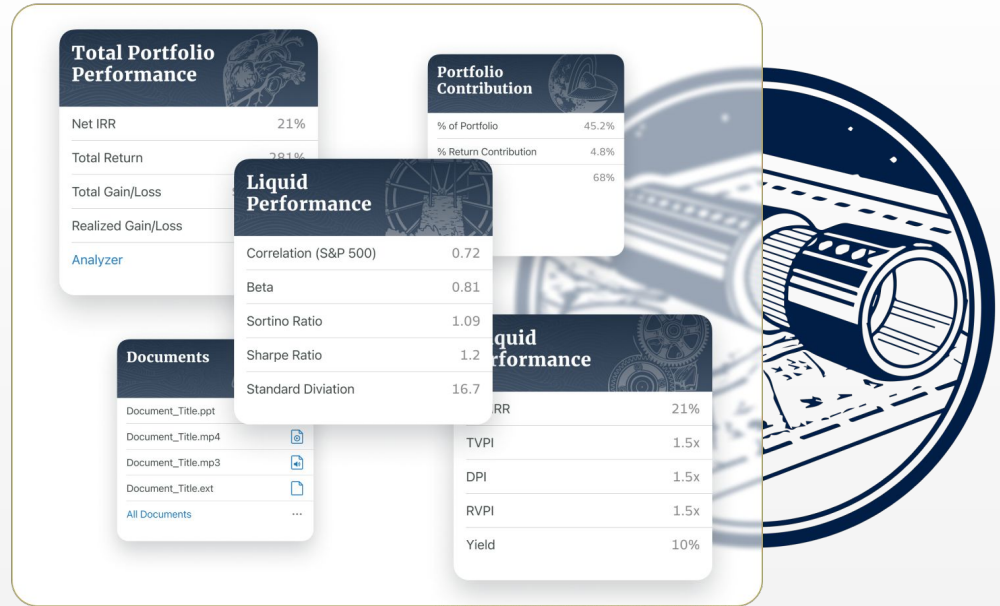
Stop wasting time generating reports full of irrelevant data that is out of date the moment you print it. Track NetIRR, Time Weighted Return, and Cost Basis right out of the box.



Copia helps you

Turn Documents Into Data

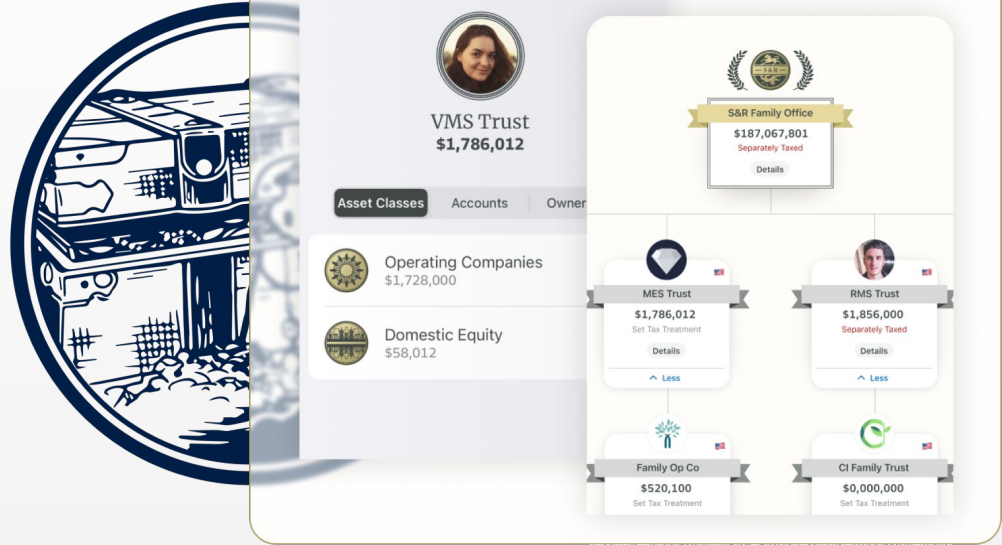
Leverage machine learning to extract data quickly, right from your email, investor portals or local storage system. Share and manage documents without losing context alongside the investments they relate to.



Copia helps you

Map Your Legal Entity Structure

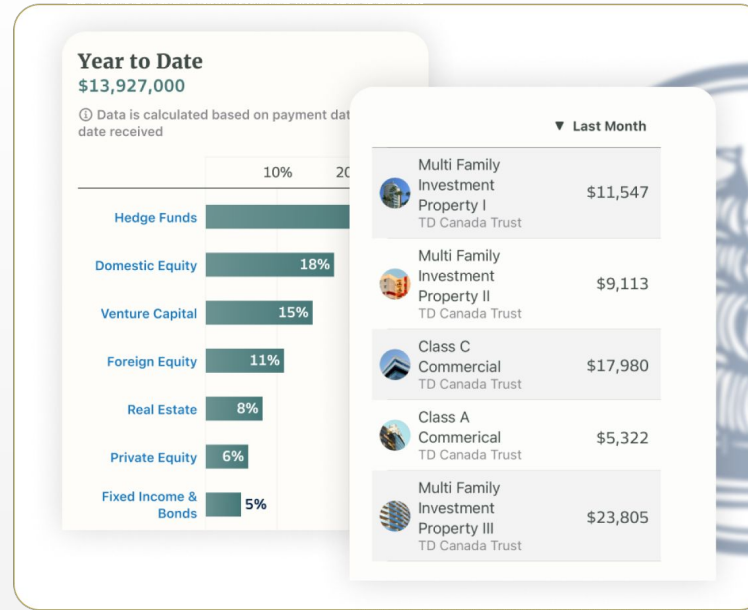
Build a personalized entity map and get a clear picture of ownership, accounts, and documents. Then grant access to your spouse, significant others, next gens, accountants, advisors, or whoever else you want.



Copia helps you

Collaborate with Key Stakeholders

Look at all your managers and advisors in the same view to understand which assets are performing and which are lagging. Benchmark your managers and understand the risk vs reward in your allocations.





Why Copia?

Our team has spent decades building hardened encryption systems for governments, enterprises, and FinTechs. We've shipped everything from #1 selling App Store apps to challenger banks.

Contemplate your portfolio
through a different lens.

Dashboards	Assets	Portfolio Value
Entities Map	Entity Switcher	Roles & Permissions
Manager Performance	Connected Accounts	% Based Ownership
Relative Performance	Ownership & Thesis	Income by Asset Class
Target Allocations	Net Worth Statement	Liabilities
Inter-entity Loans	Correlations	Alt Performance
Illiquid Breakdown	K1 Tracker	Capital Calls
Benchmarks	Contacts	SecureMail



COPIA
WEALTH STUDIOS

Thank you.

"Life is no 'brief candle' to me. It is a sort of splendid torch which I have got hold of for the moment; and I want to make it burn as brightly as possible before handing it on to future generations."

—GEORGE BERNARD SHAW