



The RainMaker App

AI-Powered Psychological Intelligence

Transforming wealth management through personality-based prospecting. RainMaker combines cutting-edge psychological profiling with artificial intelligence to revolutionize how financial advisors discover, connect with, and retain their ideal clients. We're not just improving prospecting—we're fundamentally reimagining it through the lens of psychological compatibility.

Seed Round: \$1.8M

The Crisis in Financial Advisor Prospecting

97%

**Cold Outreach Failure
Rate**

Nearly all traditional
prospecting attempts fail

330K

**Advisors Seeking
Solutions**

Financial advisors desperately
need better tools

90%

New Advisor Attrition

Poor prospecting is the
primary driver of failure

\$6B+

Annual Industry Cost

Lost in failed outreach and
wasted marketing spend

Why Now? The Next Generation Crisis

1 100,000+ Advisors Retiring

Massive knowledge and client relationship vacuum in next 5-8 years

2 90% Slower Workforce Growth

Replacement crisis looming as retirements accelerate

3 2-3 Year Protection Period

New advisors shielded with high salaries, never learning to prospect

4 Zero Prospecting Skills

Protection ends abruptly - advisors face 'find clients or fail' moment

Third-Party Validation: McKinsey Report

The McKinsey Report: 'The looming advisor shortage in US wealth management'

- 90,000-110,000 advisor shortage projected by 2034
- Industry must increase productivity to address the gap
- \$20 trillion controlled by advisors retiring in next 5-8 years
- 50% of clients plan to switch providers when advisor retires

 This creates a \$10 trillion opportunity for advisors who can prospect effectively

The Solution: Two Pathways, One Platform

HUNTER

For Advisors Seeking Rapid Growth

- Event-triggered prospect discovery (job changes, funding rounds, retirements)
- Geographic and profession-based filtering
- Psychological profile inference from public data
- Compatibility pre-screening before outreach
- Automated personalized message generation
- Multi-touch campaign management

GATHERER

Designed for established advisors leveraging existing relationships:

- Client social network analysis (LinkedIn, Facebook with permissions)
- Cross-referencing multiple client networks for warm prospects
- Relationship mapping and connection strength scoring
- Mutual connection identification across client bases
- Introduction request optimization and timing
- Permission-based network access and privacy controls

The Product: Psychological Intelligence Platform

- RAINMAKER is an AI-powered B2B sales intelligence platform that revolutionizes how financial advisors connect with ideal prospects.
- By leveraging advanced psychological profiling algorithms and cutting-edge AI technology, we offer personalized prospect matching that increases conversion rates by 25x compared to traditional methods.
- Our proprietary technology combines Jungian archetype analysis, real-time professional data aggregation, and AI-driven communication optimization to create the industry's most sophisticated prospect matching system.

Traction & Early Validation

-  **25-40% Response Rates**
Demonstrated 10-15x improvement over traditional methods
-  **MVP Live & Operational**
Platform deployed with core features validated through real-world testing
-  **50+ Advisor Interviews**
Comprehensive validation confirms market need and product-market fit
-  **132 Patent Claims Filed**
Provisional patent filed August 2025 - comprehensive IP protection
-  **Working Demo**
End-to-end workflow ready for investor demonstrations

Market Opportunity

Core Market: 330,000 US Financial Advisors

\$6B+ Total Addressable Market

Expanded TAM: Platform Technology Across Verticals

- Real Estate Professionals (2M+ agents) - \$15B
- Executive Recruiters (50K+) - \$4.8B
- B2B Sales Teams (6M+ reps) - \$10B
- Management Consulting (150K+) - \$3B

Total Addressable Market: \$97B+

Business Model & Unit Economics

SaaS Pricing Tiers

Starter: \$199/mo.

Solo advisors building practice

Teams: \$499/mo.

Established advisors

Enterprise \$99/mo./seat

Enterprise wealth management firms

7:1

LTV/CAC

Top quartile economics

85%+

Gross Margin

Software-centric model

6 mo

Payback

Rapid capital efficiency

<5%

Churn

Solid annual retention

Category Creation, Not Competition

Competitor	Their Model	Critical Gap	Our Advantage
Salesforce	Generic CRM	No FA focus	Purpose-built for advisors
SmartAsset	Lead generation	No qualification	AI compatibility scoring
Apollo.io	B2B database	Generic outreach	Personalized messaging
HubSpot	Marketing automation	No psychology	Jungian profiling

 Patent-Pending: 132 claims filed • 35M+ personality combinations • 40+ years domain expertise

Intellectual Property & Competitive Moat

What's Protected

US Patent Filed:

Aug 25, 2025

132 Claims Covering:

- Dual Hunter/Gatherer pathways
- 12-archetype advisor profiling
- Profession-based targeting
- Public-signal enrichment
- Compatibility scoring (0-100)
- Styled message generation

Why It's Non-Obvious

Novel Integration:

Prior art has personality analysis OR lead scoring OR messaging—not the integrated FA-specific workflow

Unexpected Results:

25-40% response rates vs 2-3% industry standard (10x improvement)

Long-Felt Need:

Historic 97% prospecting failure—if obvious, someone would have solved it

Defensibility

✓ Patent Pending

132 claims filed, continuations planned

✓ First Mover

Defining category standards

✓ Data Moat

Proprietary compatibility scoring improves with use

✓ 135 Primary and Secondary Archetype Combos

12 archetypes create high replication barrier

✓ Domain Expertise

40+ years FA knowledge embedded in algorithms

📄 Protected Innovation: Advisor archetype → profession targeting → public-signal enrichment → compatibility scoring → personalized outreach in a single FA prospecting workflow

The Team

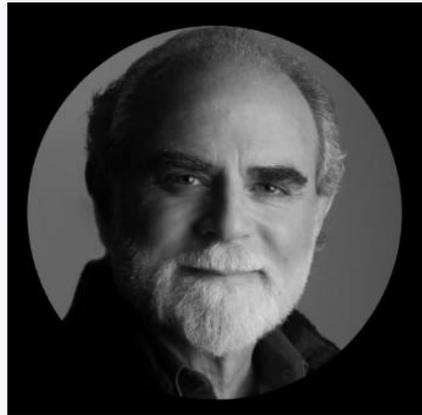
Gary Sinderbrand - Founder & CEO

- 40+ years as practicing financial advisor and master coach
- Built training programs at Merrill Lynch and UBS
- Trained 12,000+ advisors across major wirehouses
- 300,000+ advisor email list for immediate distribution
- 5,000+ LinkedIn connections in wealth management
- Creator of BetterPath Training curriculum



Building Post-Funding:

- CTO - Full-stack engineer with AI/ML expertise (committed)
- VP Sales - WealthTech go-to-market executive
- Head of AI - PhD combining behavioral science with ML



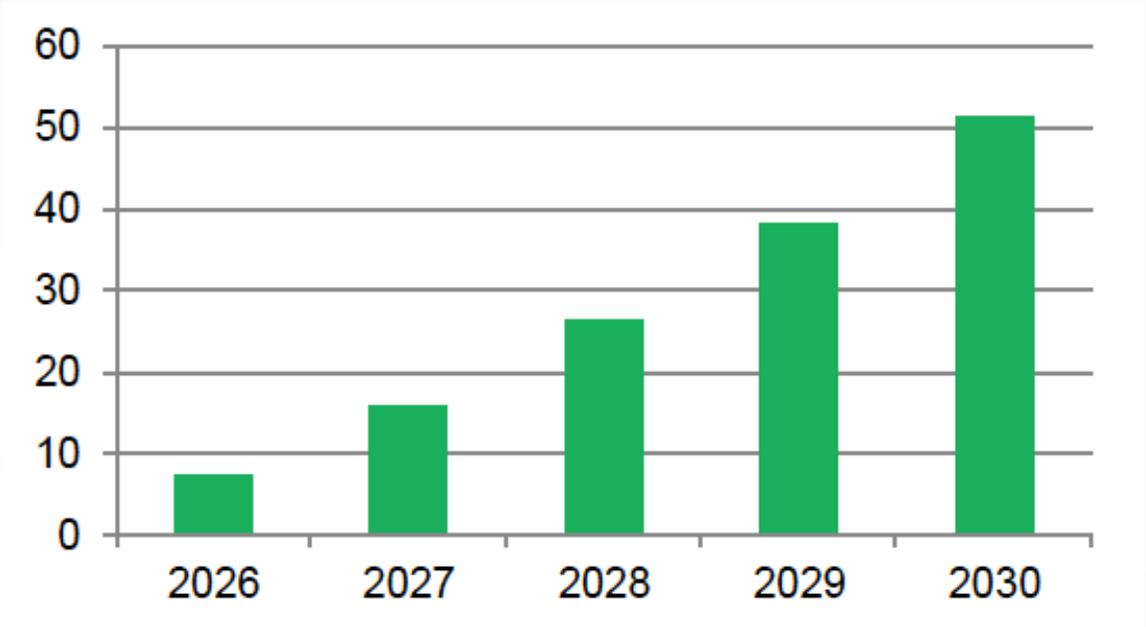
Stephen A. Martin, PsyD, a graduate of the C. G. Jung Institute in Zurich, has been in private practice in Ardmore, Pennsylvania, for over 35 years. Cofounder and president emeritus of the Philemon Foundation and the Philadelphia Association of Jungian Analysts.



Dr. Jimmie Lenz is Director of the Master of Engineering in FinTech and Cybersecurity at Duke University and leads the Digital Asset Research and Engineering Collaborative (DAREC). With 25+ years in capital markets, he has served as Chief Risk Officer and Chief Credit Officer at a top-three broker-dealer and Head of Predictive Analytics for one of the largest US wealth management firms. Dr. Lenz holds a DBA in Finance from Washington University's Olin Business School and holds multiple patents in financial technology and digital assets.

Financial Projections

Operating Leverage - Path to Profitability



Year	EBITDA Margin
2026	68%
2027	75%
2028	78%
2029	79%
2030	81%

Conservative Cost Management:

- 5% annual increases built into all costs
- Measured hiring plan - 11 employees by 2030
- SaaS model provides 80% gross margins
- Profitability from Year 1

Seeking \$1.8M to Revolutionize an Industry

We are raising a \$1.8M seed round to scale our platform, accelerate customer acquisition, and achieve \$2M ARR within 18 months.

18-Month Runway to Series A

Let's Build the Future Together

Raise Amount

\$1.8M Seed Round

Structure

SAFE Note with founder-friendly terms

Where Psychology Meets Prosperity™

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Schedule a Live Demo



Scan to Schedule