



BrainyRich

BrainyRich gives investors, advisors and firms one honest view of every account — and one governed way to act on it.

PARTNER
CHEAT SHEET
BRAINYRICH.COM

Net worth

Goal planning

Rebalancing

Advisor book

Typed insights

WHAT IT IS

A wealth platform where investors, advisors and firms share one record of every account, goal and trade.

30-SECOND PITCH

Money sits in five apps and never lines up. BrainyRich rolls every account into one net-worth number, funds goals from real accounts, and turns drift into a rebalance proposal someone reads before it runs.

PROBLEM WE SOLVE

- Net worth spread across five logins
- Goals written down, never actually funded
- Rebalancing done by hand in spreadsheets
- Fees that rise with the market

VALUE PROPOSITION

- One record from account to rebalance
- Goals funded by real accounts, honestly projected
- Rebalance proposals reviewed before anyone acts
- Flat subscription, never a slice of assets

IDEAL CUSTOMER

Multi-account households, solo and small RIA advisors, compliance-minded firms up to mid-size

Not a fit: Budget-only users; buyers needing custodian trade execution today

WHO YOU ARE TALKING TO

Investor — What is your net worth today?

Solo advisor — How long does rebalancing take?

Firm principal — How many tools does supervision need?

Compliance officer — Who approved that trade, and when?

TOP USE CASES

- One net-worth number across every account
- Fund a goal, get a verdict
- Apply a model to a household
- Rebalance through a reviewable proposal
- Triage typed, severity-ranked insights

CAPABILITIES

- Net-worth roll-up
- Typed accounts
- Transaction ledger
- Funded goals
- Goal projections
- Model portfolios
- Rebalance proposals
- Typed insights
- Field-level permissions
- Consolidated AUM

PRICING

Free	\$0
Plus	\$99/mo or \$79/mo annual
Pro	\$399/mo or \$319/mo annual
Business	\$999/mo or \$799/mo annual
Enterprise	\$12/advisor-seat/mo list, from \$9/advisor-seat/mo annual

Free tier; flat tiers from \$99 monthly; no AUM fee

COMPETITIVE LANDSCAPE

Empower — Flat price, real advisor tools, no upsell

Kubera — Tracking plus planning, rebalancing and advisory

Wealthfront — Sees every account, not only managed ones

Addepar — Same advisor workflow, priced for small firms

WHY US

- Investor, advisor and firm in one workspace
- Goals funded from real accounts, not aspirations
- Rebalancing is a reviewable, attributable artefact
- Permissions on every field, attribution everywhere

PROOF & CREDIBILITY

- Pre-launch: no customers, no references yet
- Nine permission-enforced resource types, workspace-scoped
- Published contracts, DPA and security exhibit

DEMO

Book a 30-minute walkthrough; no self-serve trial before launch

TALKING POINTS

- One data model, no re-keying between tools
- Flat fee beats percentage-of-assets on large portfolios
- Automation gaps stated openly, not discovered later
- Governance inherited from the platform, not bolted on

OBJECTION HANDLING

"You are too early for us"

Start free and judge the data model, not the traction.

"Why not just use Empower?"

Empower charges a share of assets and lacks advisor tooling.

"Does it link accounts automatically?"

Not yet. Manual entry today; automatic linking is roadmap.

DISCOVERY QUESTIONS

- How many places hold your money?
- How long does a rebalance take?
- Which goals are funded, and by what?
- What do you pay in platform fees?
- Who reviews an advisor's recommendations?

SPOT A GOOD OPPORTUNITY

- Spreadsheet is the system of record
- Paying AUM fees on a large portfolio
- Advisor book outgrowing manual rebalancing
- Compliance asking for an audit trail
- Wants automatic custodian linking on day one
- Needs a certified platform on contract

HOW TO INTRODUCE US

"I know a wealth platform where your accounts, goals and rebalancing live in one governed workspace."

LEAD HANDOFF

Send the name, role, account or household count, and the problem they described.

PARTNER COMMERCIALS

10-15% of first-year net subscription; up to 15% reseller margin

USEFUL LINKS

BrainyRich website brainyrich.com

App shell app brainyrich.com

Documentation docs brainyrich.com

Use-case stories brainyrich.com/use-cases

Comparisons brainyrich.com/vs

TALK TO US

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