SAVVLY

Learn more at **savvly.com**

Reinventing retirement, together.

Just 5% of your portfolio can give you a personal pension for late-life financial security.

Savvly is designed to provide peace of mind through late-life payouts. Protected by the largest asset management firms, Savvly removes the uncertainty from retirement planning and provides a financial safety net when it's needed the most.

Why it matters

46% of today's 65-year-olds can expect to live past 90.[1]

66% of people run out of money before they reach 85.[2]

Less than 5% of portfolios have long life protection.

What Savvly is (and isn't)

Savvly is not an insurance policy.

Savvly is a private personal pension that can provide payouts made up of market returns and long-life bonuses.

Savvly is not a traditional actively managed fund.

Savvly is a tax-efficient way to hedge against the expenses that come with a long life with just 5% of your total portfolio.

Savvly is not an annuity, but it still provides income.

Savvly late-life payouts help provide peace of mind in retirement, at a fraction of the cost of alternatives.

How Savvly works

Patty: 65, net worth $1M

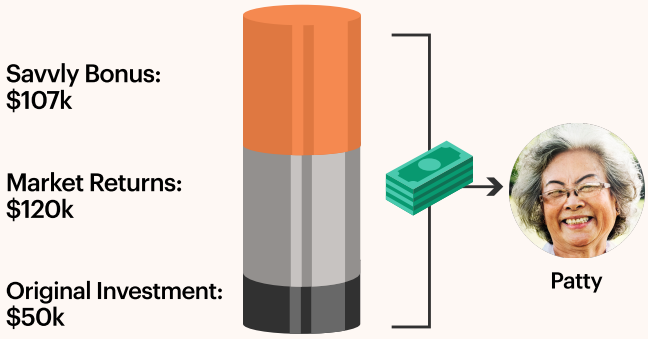
Invests: 5% ($50k)

Payout age: 86

Expected payout: $277k[3] including:

- The market value of her original investment
- Long-life bonus that's determined by the same actuarial science insurance companies have been profiting from for years

If Patty passes away before 86, her estate will receive the majority[4] of her original investment back and the rest is reallocated among other Savvly investors.



Total payout with Savvly: $277k
Almost double the markets alone

1. "You Might Live Longer Than You Think. Your Finances Might Not", Wall Street Journal, February 10, 2023.
2. Allianz Life Study.
3. Assumes S&P 500 real growth of 6% per annum. See website for details, assumptions, and disclosures.
4. 75% + 1% for every year with Savvly, applied to the lesser of either the initial investment or the current market value.

At this time, Savvly is only available to accredited investors and accepts non-qualified investments (after-tax money).

Questions? Reach out to Dario Fusato, CEO
dario@savvly.com