



FinMason





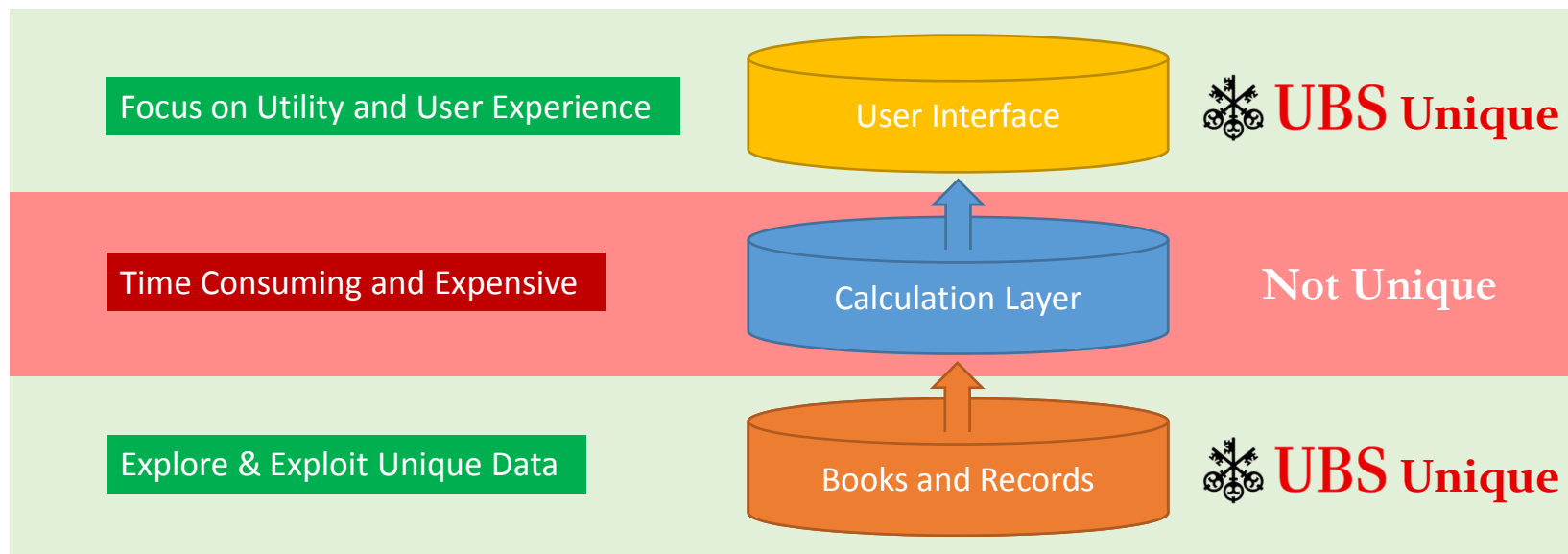
 **UBS Future of Finance**

Building WealthTech  
Just Got a Lot Easier

Proprietary

WHY

Calculation layer not differentiating and very expensive if on legacy systems





Why FinMason? 30-Year Industry Veteran + 9 PhDs + Modern Tech

A background image of a server room with rows of server racks, illuminated by blue and green lights, creating a sense of depth and technology.

## The Algonath

**BIG**

700+ Analytics

**BROAD**

All Securities Globally

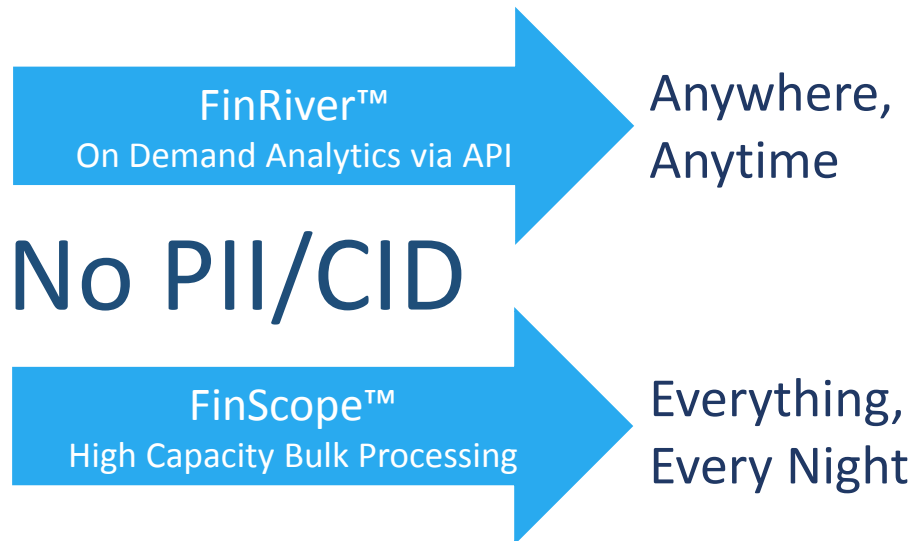
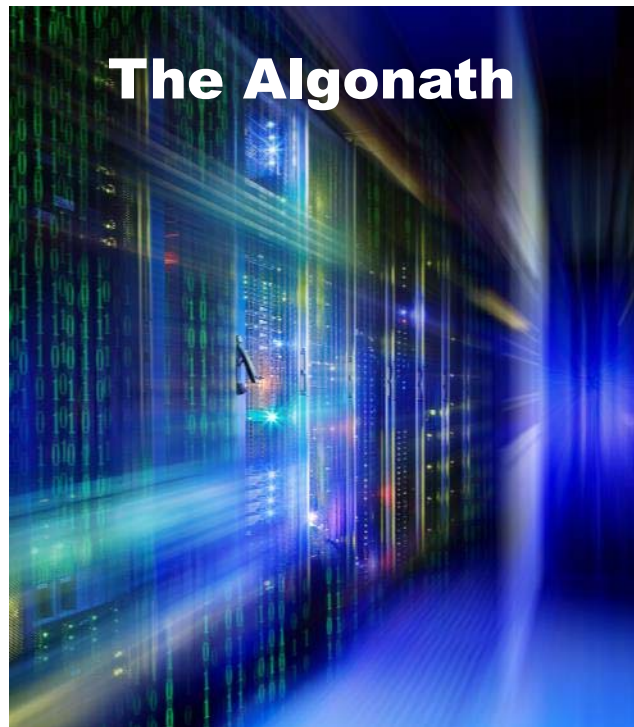
**SCALE**

Average Calc < 20ms

**FLEX**

Add Calcs in 48 Hours

Easy Integration



## Who Are FinMason's Clients?

### Asset Managers



### FinTech Firms



### Pensions

Finished Due Diligence  
Pilot with Live Client by  
YE

### Custodians



### Start-Ups



### Performance

In Contracting



## Senior Analytics Team

**Kendrick Wakeman, CFA**  
**CEO & Founder**

30-Year Institutional Investor  
Fmr PM/Analyst Lazard Asset Management  
Dartmouth College

**Robert Blake, PhD**  
**Head of Macroeconomics**

Fmr Senior Macro Strategist, State Street  
Fmr Strategist, Citigroup  
PhD Columbia University, Economics

**Mark Carroll**  
**Senior Data Scientist**

Fmr Head Financial Eng, Eze Software  
MS U of Washington, Computational Finance  
Columbia University, Mathematics

**Dr. Leonid Kogan**  
**Analytics Advisor**

Head of Finance, MIT Sloan  
PhD Cornell, Mechanics  
PhD MIT, Finance

**Adam Tashman, PhD**  
**Analytics Advisor**

Head of Data Science Carpe Data  
Fmr Sr Quantitative Analyst, RBS  
PhD Stony Brook, Applied Math and Stats

**Saeid Hoseinzade, PhD**  
**Senior Data Scientist**

Suffolk University  
PhD Boston College, Finance  
Several publications on Fixed Income

**Jian Liu, PhD, CFA, FRM**  
**Senior Data Scientist**

PhD Peking University, Computational Math  
Masters MIT, Quantitative Finance  
13 peer reviewed publications

**Dan Pierce, PhD**  
**Global Macro Committee**

30 Years Investment Experience  
Fmr PM, SSgA  
PhD Brown University, Engineering

**Marek Vesely, PhD**  
**Chief Technology Officer**

Fmr CTO, CaseNet  
Fmr GM, CaseNet Europe  
PhD, Charles University, Mathematical Modeling