



Creating Money Rules



# MONEY RULES



**What is the purpose of investing?**

- **Create permanent wealth**
- **Cash flow**

**What is the most important ROI?**

- **Return on investment**
- **Reliability of income**

**How do you measure wealth?**

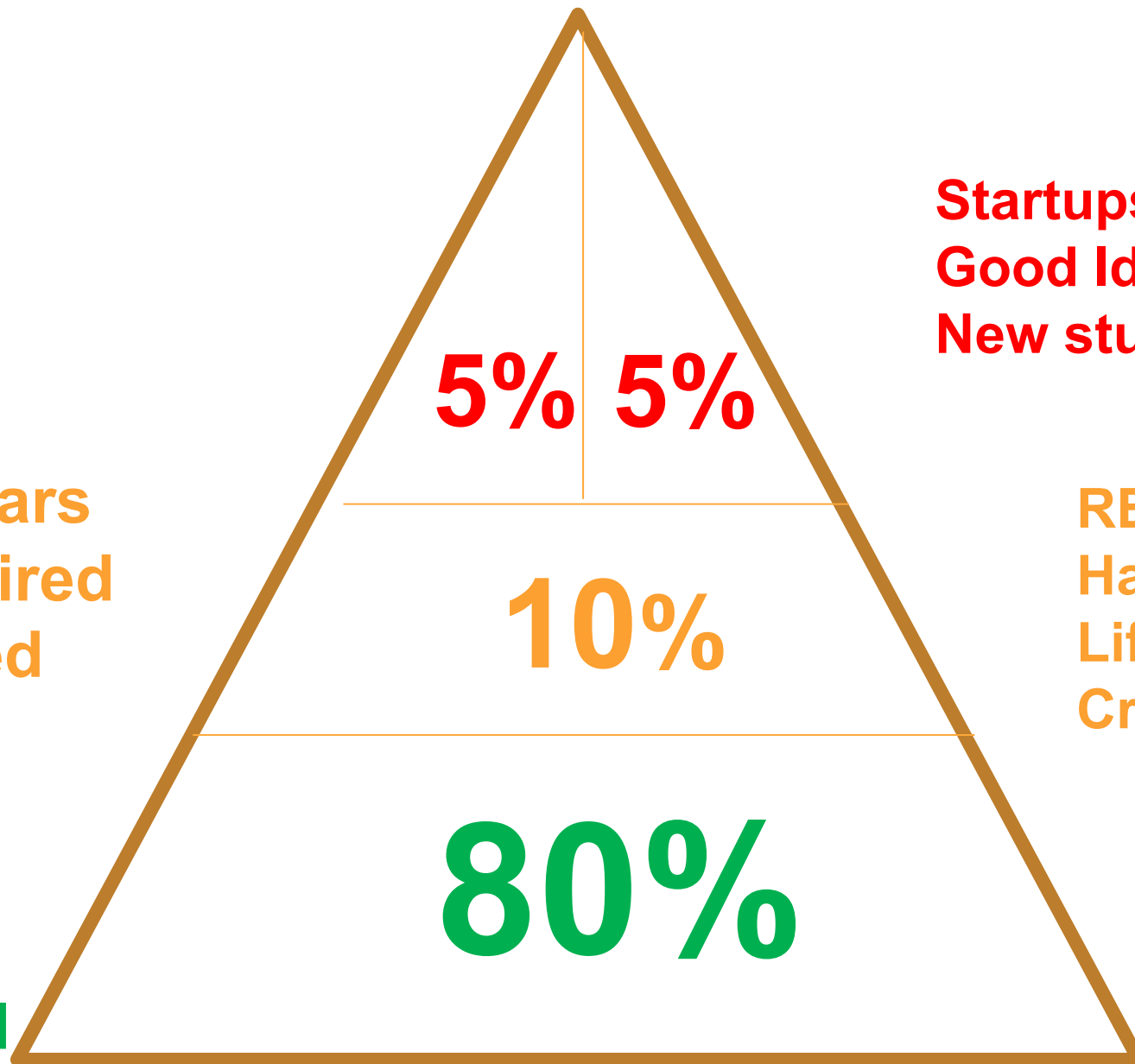
- **A flat dollar amount**
- **Liquid available**
- **Time you can go without time/money trade**



**Not liquid**  
**Little recourse**  
**20%+ expected**

**Liquidity 1-5 Years**  
**Collateral Required**  
**12-18% expected**

**Liquid 75%**  
**Insured**  
**Regulated**  
**8-12% expected**



**Startups pre revenue**  
**Good Ideas**  
**New stuff**

**RE Notes**  
**Hard Money**  
**Life Settlements**  
**Crypto Currency**

**Stocks**  
**Bonds**  
**Life Insurance**  
**Real Estate C.F.**



# 7 Questions of Due Diligence

1. **Is the investment congruent with my Money Rules?**
2. **What is my exit strategy?**
3. **Is “Big Money” investing in the space?**
4. **Who has oversight? Is the information public?**
5. **Are the economics of the offer sound?**
6. **Will the marketing plan or business plan deliver the economics?**
7. **Can the Leadership Team successfully execute the marketing or business plan?**



A wireframe figure of a person is centered in the image. The head is highlighted with a red mesh, while the rest of the body is a grey wireframe. Numerous small, semi-transparent triangles and lines are scattered around the figure, some appearing to float in the air. The background is a light, textured grey.

**The investing landscape is flawed**



## Dated approach:

- Diversification and goal-based methods are ancient and riddled with unnecessary risks
- The pros have better tools. Why is the average investor forced to settle?

## Failing to meet customer expectations:

- Investing is light years behind other verticals
- Especially for our target “technology driven” consumers
- Yet rich, available data should make this sector a leader in personalized consultation

## Ridiculous ambiguity:

- Few investors, if any, can ever tell you what they actually pay in fees
- Large institutions promise transparency but rarely follow through
- Fails to meet consumer expectation set in other sectors





**Individual investors are  
paying the price**



**We live in a world that is drastically improved through predictive intelligence and automation. But when it comes to our financial future, we are told to:**

“Stay the course” & “Buy and hold”

**(No risk management rebalancing, no real protection)**

**OR**

We have the good fortune to have more wealth and in that case, we are generally encouraged to invest it with an advisor who hands it off to another team of money managers who invest in textbook equity and fixed income strategies while accumulating a mountain of fees in the process. Somewhere between 2%-6%.

**(Too expensive, not transparent, mediocre returns)**

**OR**

We attempt to take control of our finances, learn, manage and invest. But life becomes too busy and most individuals fail at being consistent and successful.

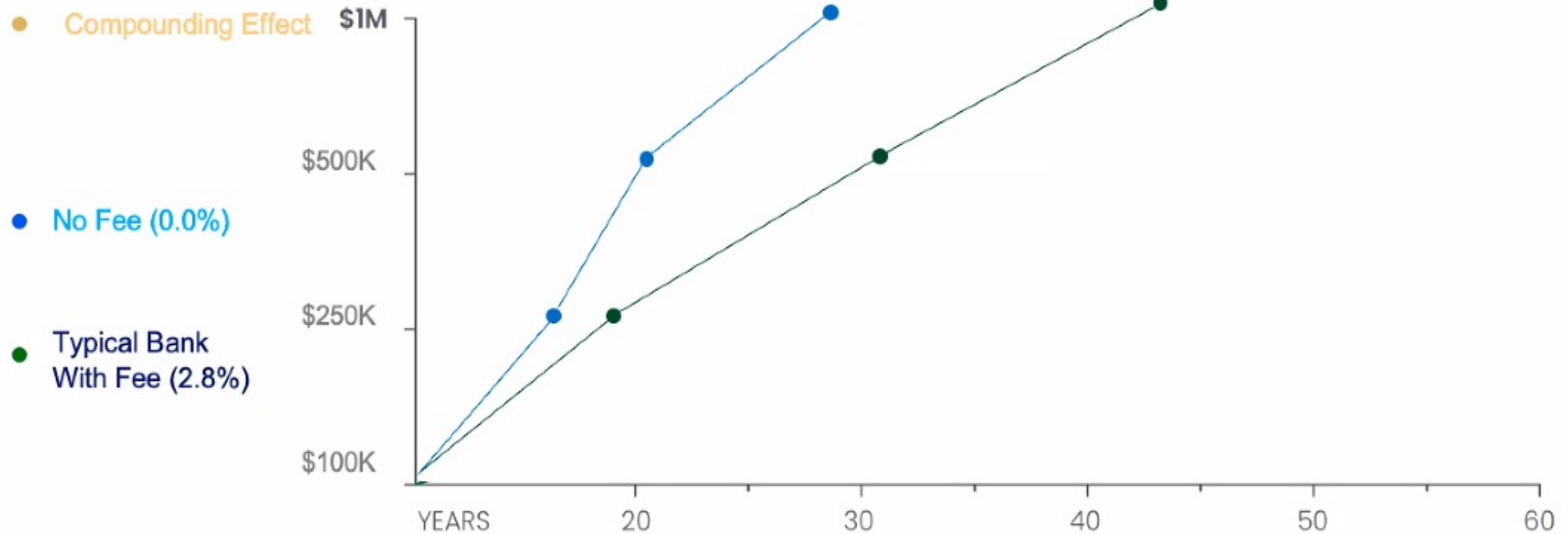
**(Not automated, too cumbersome)**

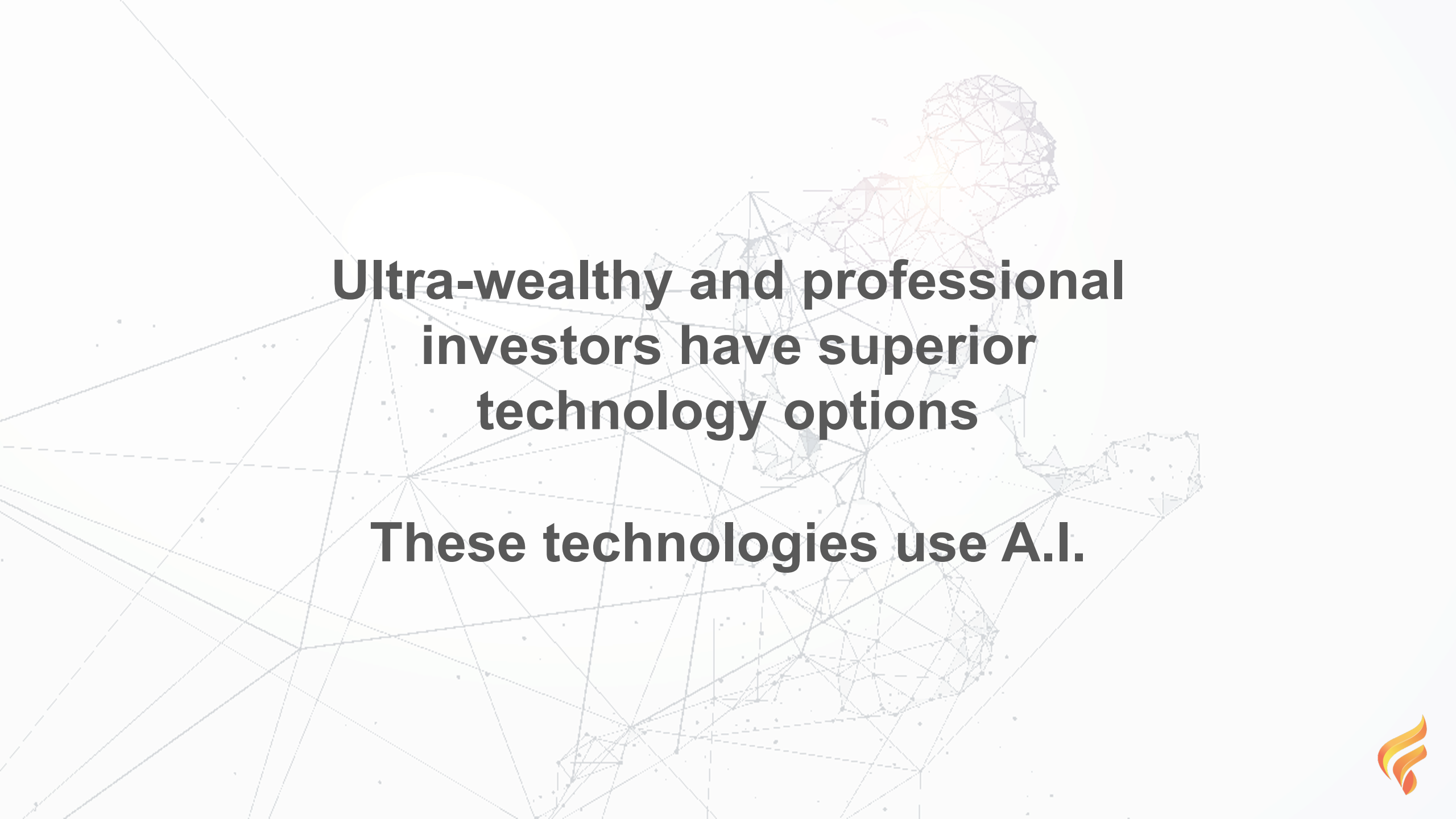




# Growing Your \$100,000 to \$1,000,000

## Compounding Effect





**Ultra-wealthy and professional  
investors have superior  
technology options**

**These technologies use A.I.**





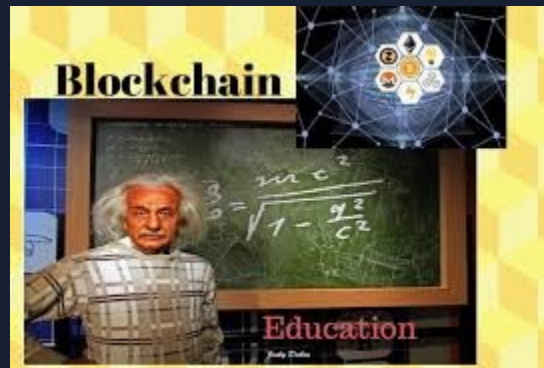
# ABOUT THE AUTHOR

**Kelly Korshak**  
Co-Founder/CTO

The first ever, **truly AI-driven portfolio**.  
Proprietary, fully automated and **proven**.



Kelly Korshak, cryptocurrency enthusiast and co-founder of iFlip, developed A.I. investment technology for over +20 years—managing billions of dollars for institutions including Brevan Howard, Deutsche Bank and Morgan Stanley



# What is an Algorithm?

al·go·rithm /'algə,riTHəm/

- a process or set of rules to be followed in calculations or other problem-solving operations, especially by a computer

# What is an Artificial Intelligence?

artificial intelligence (AI)

- A process or set of rules to be followed in calculations or other problem-solving operations **that have the ability to change their own rules**



# A Few Smartfolios



## Conserve+

Risk: Conservative

Stable combination of American bonds, energy, and tech sector stocks.

## SP +Beta

Risk: Moderate

The top 500 US companies with a touch of 20% beta tech stocks.

## Mod+

Risk: Moderate

Fuse of overall market exposure, bitcoin proxy, recovery, and tech stocks.

## 4Q Rotate

Risk: Aggressive

Strong gains for stocks that change quarterly, based on A.I. analysis.

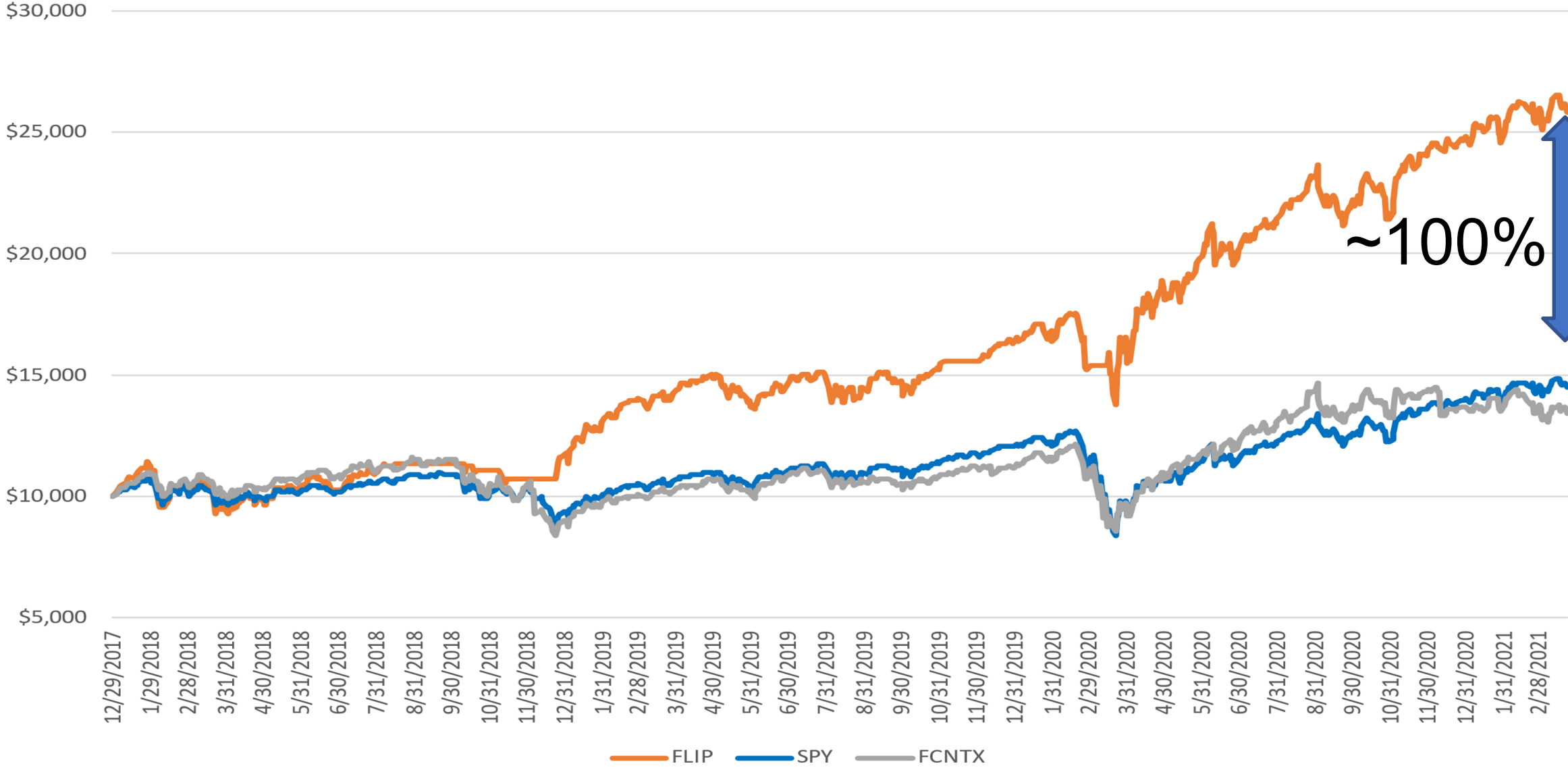
## Aggressive

Risk: Aggressive

High potential tech stocks looking to capitalize on future market innovations.



# FLIP vs SPY vs FCNTX



Market is the SPY and Fidelity Mutual Fund is the FCNTX.



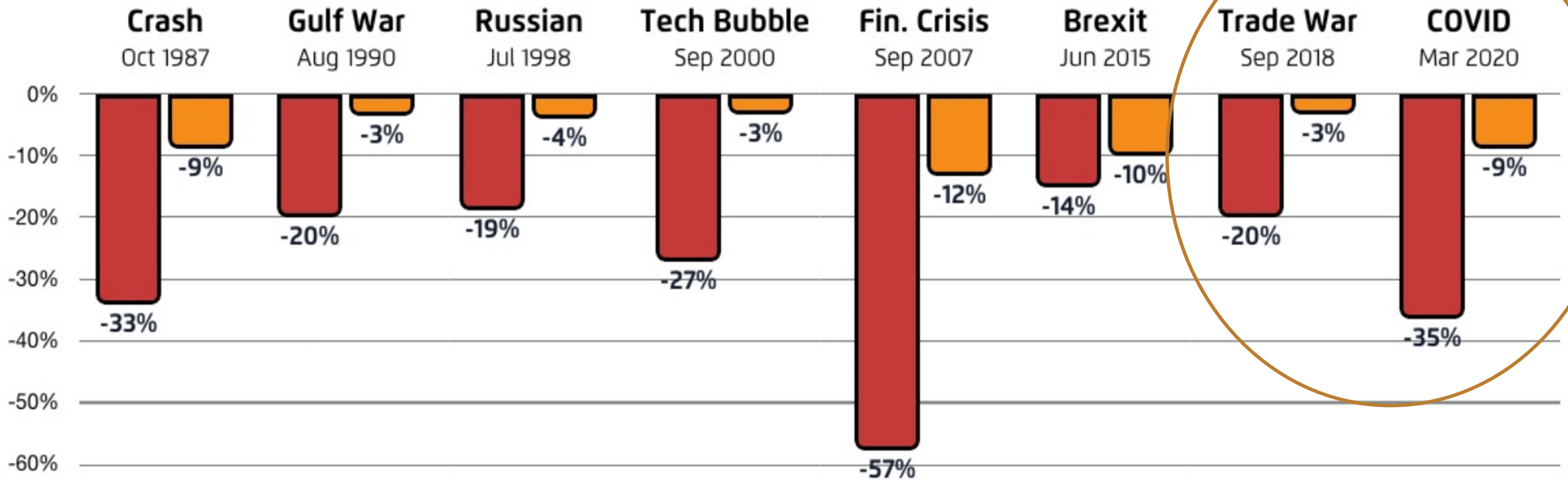
# How iFlip's AI Smartfolio Beat The 2020 Crash

iFlip's S&P SmartFolio predicted the Feb. 2020 crash 3 months before it happened. Many iFlip customers questioned why the A.I. sold their positions Nov. 8, 2019 when the market was still hitting highs. It all made sense when the market finally crashed, saving investors over 20%.



# Market Crash Loss Comparison

■ Market (S&P 500) vs 
 ■ iFlip's (AI)



**Average Crash Savings = 24%**





## Intro

**\$0**/mo

no setup cost

Unique Smartfolios  
**1**

Max Balance In Smartfolios  
**\$6k**

Max Balance Manual  
Trading  
**Unlimited**

Sign Up

## Lite

**\$10**/mo

no setup cost

Unique Smartfolios  
**2**

Max Balance In Smartfolios  
**\$25k**

Max Balance Manual  
Trading  
**Unlimited**

Sign Up

## Adv

**\$37**/mo

+ \$997 setup cost

Unique Smartfolios  
**5**

Max Balance In Smartfolios  
**\$50k**

Max Balance Manual  
Trading  
**Unlimited**

Schedule Now

## Pro

**\$77**/mo

+ \$1,997 setup cost

Unique Smartfolios  
**Unlimited**

Max Balance In Smartfolios  
**Unlimited**

Max Balance Manual  
Trading  
**Unlimited**

Schedule Now



# Black Friday Deal!

- Flip PRO Platform - \$1997
- Flip Crypto Platform - \$1500
- Crypto Masterclass - \$1500

**TOTAL VALUE \$4997**

