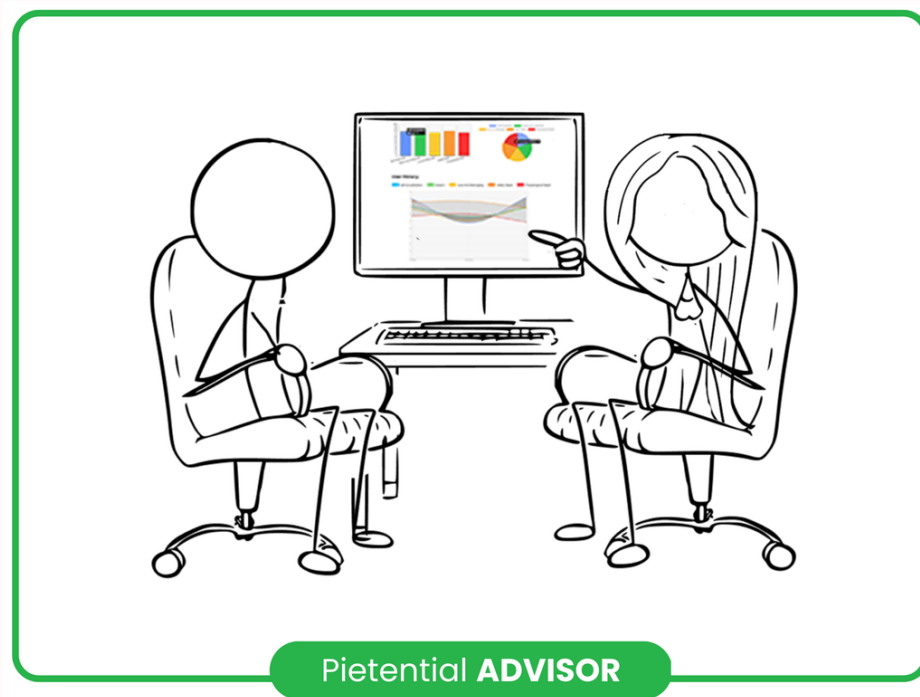


Pietential Advisor

— Deepening Connections
and Supporting Wellbeing

Confidential



Pietential ADVISOR

— Deepening Connections and Supporting Wellbeing

As a trusted advisor to your clients, you understand the importance of supporting their overall wellbeing. Whether you're a life coach, counselor, therapist, financial advisor, nutritionist, personal trainer, CEO mastermind group facilitator, or business consultant, you want to ensure that your clients are not only achieving their goals, but are also thriving in all aspects of their lives.

Pietential ADVISOR is a wellbeing monitoring and improvement platform that empowers advisors to deepen their connections with clients and support their overall wellbeing. By leveraging the power of wellbeing data, Pietential ADVISOR provides you with the tools you need to monitor the wellbeing of your advisees, and offer personalized support to help them thrive.

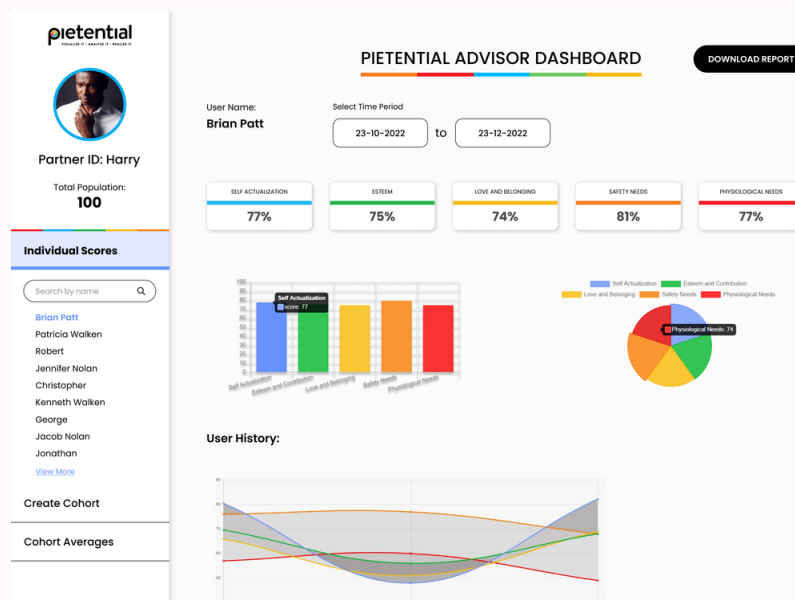
What is *Pietential*?

Based on Maslow's Hierarchy of Needs, Pietential is a real-time emotional index that offers advisors insight into the wellbeing of the individuals and populations they serve. Through interactive visualizations, benchmarking, and monitoring, advisors can better understand their clients' emotional state of being.

Pietential also functions as a wellbeing visualization tool and personal development platform. It offers your clients insights into their state of being and growth potential while helping them measure and monitor progress toward certain goals. When opted for by you and your client, Pietential ADVISOR also offers "Actualize It" self-improvement exercises to foster personal growth further.

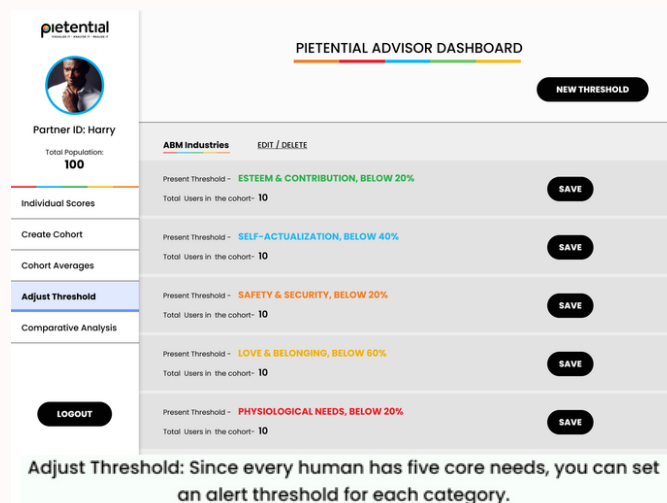
Why Pietential ADVISOR?

- **Getting (and Staying) Deeply Connected:** By providing a platform for ongoing wellbeing monitoring, Pietential ADVISOR allows you to stay in touch with your advisees via self-reporting and offer support as needed. This ongoing connection helps to build trust and rapport, which is essential for well-grounded advisory relationships.
- **Supporting Wellbeing on a Personalized Basis:** Perhaps the most powerful aspect of Pietential ADVISOR is its ability to support the wellbeing of your advisees on a personalized basis. By tracking a wide range of wellbeing factors, including physical health, emotional health, relationships, and overall life balance, Pietential ADVISOR provides a comprehensive view of your advisees' wellbeing. Armed with this information, you can offer personalized support to help your clients improve their wellbeing and achieve their goals.



- **Progress Tracking:** Pietential also offers a progress tracker that allows users (your clients) to monitor their emotional wellbeing progress over time. This feature enables individuals to see the progress they are making, and to adjust their approach if necessary.

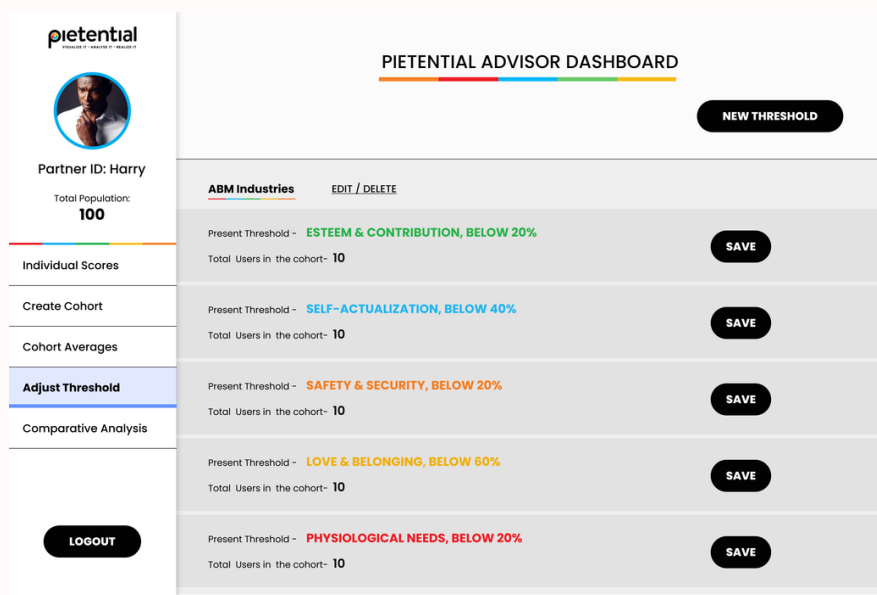
- Setting Alerts for Dips in Wellbeing:** In addition to providing ongoing wellbeing monitoring, Pietential ADVISOR also allows you to set alerts so that you can monitor when an advisee's wellbeing has dipped. This proactive approach enables you to offer support before a problem becomes more serious, helping your clients to stay on track and maintain their momentum. With this feature, advisors can stay ahead of developments in their client's wellbeing and make necessary preparations or devise strategies to offer assistance.



- Utilize Pietential's Observations, Recommendations, and Exercises To Your Benefit:** Aside from the progress tracking feature, Pietential ADVISOR also provides observations and recommendations based on the user's score. This feature outlines their relative strengths and weaknesses with the intention of developing an increased sense of self-awareness, which the advisors can build upon to improve their client's emotional wellbeing in a targeted and measurable way. Plus, the platform also offers personal growth hacking exercises that can help your clients build resilience, develop self-awareness and emotional intelligence, process their emotions, understand their role in society, and learn practical skills to manage stress and build healthy habits.

- **Using Pietential as a Business Development Tool:**

Simultaneous to its benefits for ongoing client relationships, Pietential ADVISOR can also be used as a powerful business development tool. By offering Pietential as a freemium to prospective clients, you can initiate conversations about life balance and what's important to them. This approach helps to build trust more quickly and can lead to deeper, more meaningful advisory relationships.

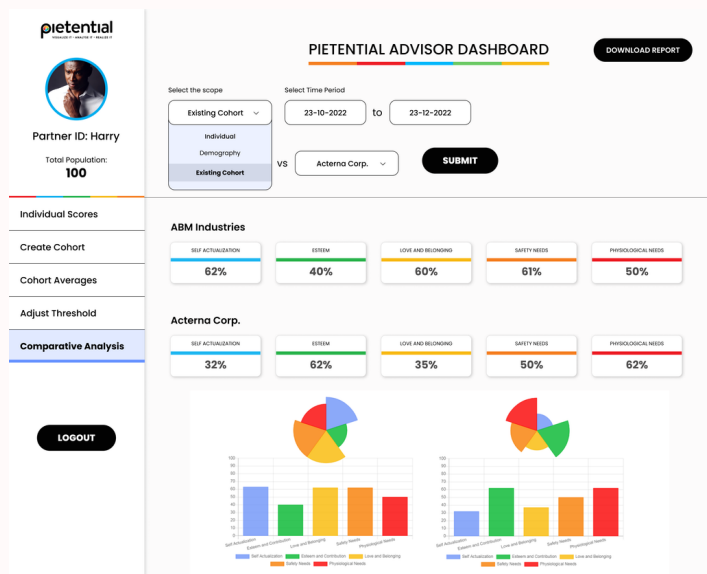


Note: For advisors advising multiple individuals from the same group or organizations (instead of distinct individuals), Pietential is set up to assist their practice too. While an ADVISOR account is limited to one hundred client profiles on the system under the advisor's subscription, an advisor who wants to onboard an organization can use Pietential BUSINESS, ENTERPRISE, or NGO. The Pietential team can help set up the account, making them an administrator with the client's permission.

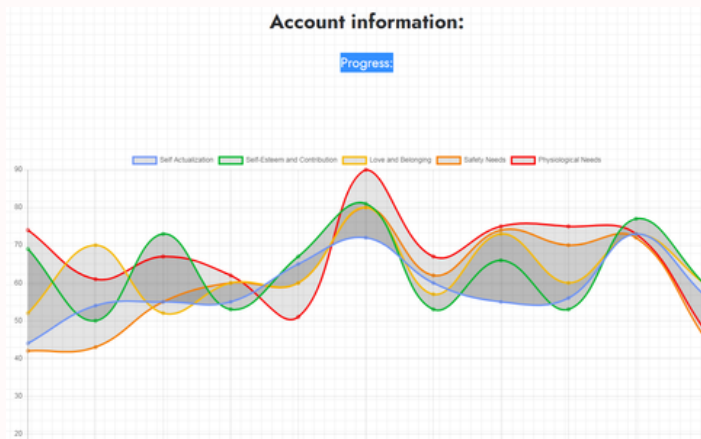
Below are the features and benefits of Pietential ADVISOR.

Features and Benefits:

- **Benchmarking:** The platform allows advisors to benchmark their clients results at a given point in time and compare data from other clients or client organizations in similar situations, industries, regions, etc.

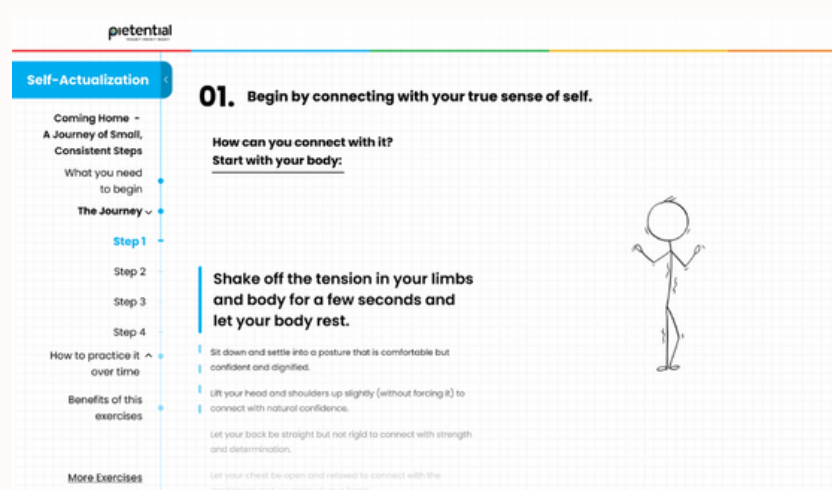


- **Analytics:** Advisors have access to real-time analytics to monitor their clients' progress and identify areas for improvement.

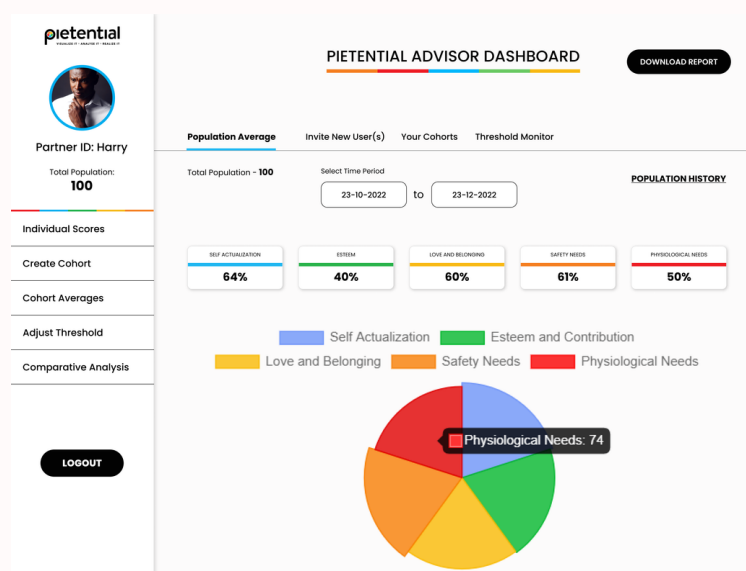


- **Multiple Device Access:** The tool provides access through multiple devices to increase participation and engagement from clients.

- **Observations, recommendations, and exercises:** Based on the scores, users are provided observations and recommendations to help them build self-awareness. This is followed by a set of personal growth hacking exercises that help the user get in touch with their inner selves, process their emotions, and embrace their place in society.



- **Data visualization:** The platform offers visualizations of the survey data, making it easy for advisors to identify patterns and trends.

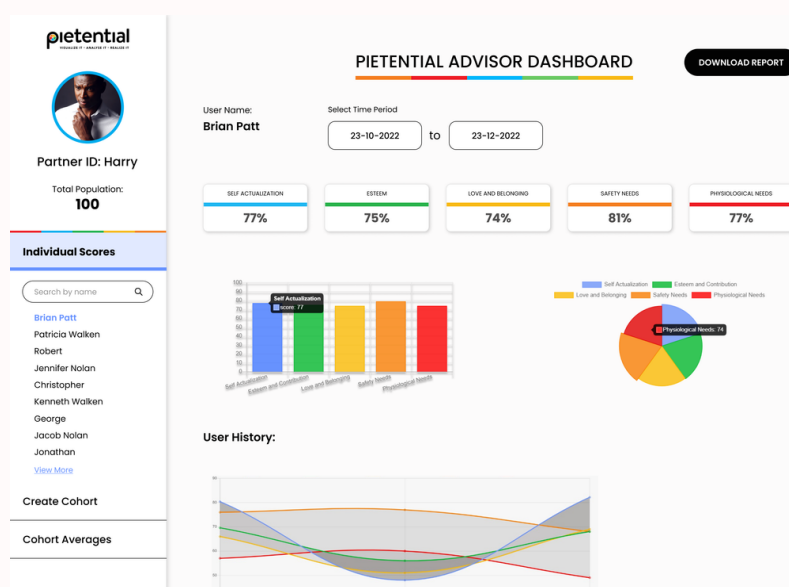


- **Collaboration:** Advisors can work collaboratively with their clients to develop action plans and implement wellbeing improvement initiatives.

- User confidentiality (only for organizational setup):** Pietential is highly committed to user confidentiality. If you're advising an organization, clients have the choice to disclose or conceal their scores from you, unless demanded by the organization's Privacy Policy.. While their individual data is kept confidential, you can still access the aggregate anonymized data visualizations to understand the wellbeing of your population. This protects the individual's right to privacy while ensuring that the organization's averaged information remains unaffected.

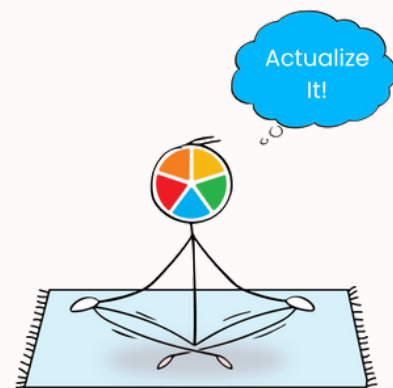


- Download Reports:** With Pietential ADVISOR, you can generate and download reports of the individual, cohort, and population wellbeing. You can also download reports of comparative analysis by custom selection of demographics.
- Real-time client wellbeing monitoring:** Visualize the wellbeing for any selected period for a particular client. Download the report, keep an eye on the changes, and embark on the journey of self-development with your client.



- **Secure data management:** The platform ensures the security and confidentiality of clients' data through encryption and secure data storage.
- **Offers a data-driven approach:** The platform's data-driven approach allows advisors to provide clients with evidence-based recommendations for improving client wellbeing.

- **Attract and Retain Clients:**
By offering a valuable wellbeing improvement solution, advisors can improve client retention and attract new clients through word-of-mouth and marketing campaigns to prospective clients.

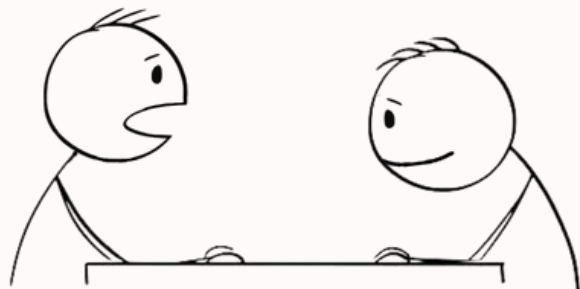


- **Streamlines the advisory process:** The platform's user-friendly interface and customizable demographics facilitate the advisory process, making it more efficient and effective.
- **Helps advisors stay up-to-date:** The platform's real-time analytics and benchmarking capabilities allow advisors to stay up-to-date with their clients and cohorts.

- **Capture early signs of client-related issues:**
Our Advisor Dashboard's threshold monitor acts as an early warning system on issues like disengagement, helping advisors detect and prevent negative outcomes associated with poor wellbeing.



Pietential ADVISOR supports ongoing client relationships by initiating conversations about life balance and improving wellbeing, and leading to deeper, more meaningful advisory relationships. Overall, it is a valuable tool for any advisor who wants to ensure that their clients' wellbeing is on track and they thriving in all aspects of their lives.



www.pietential.com

The Life Balance & Population
Wellbeing Realization System