

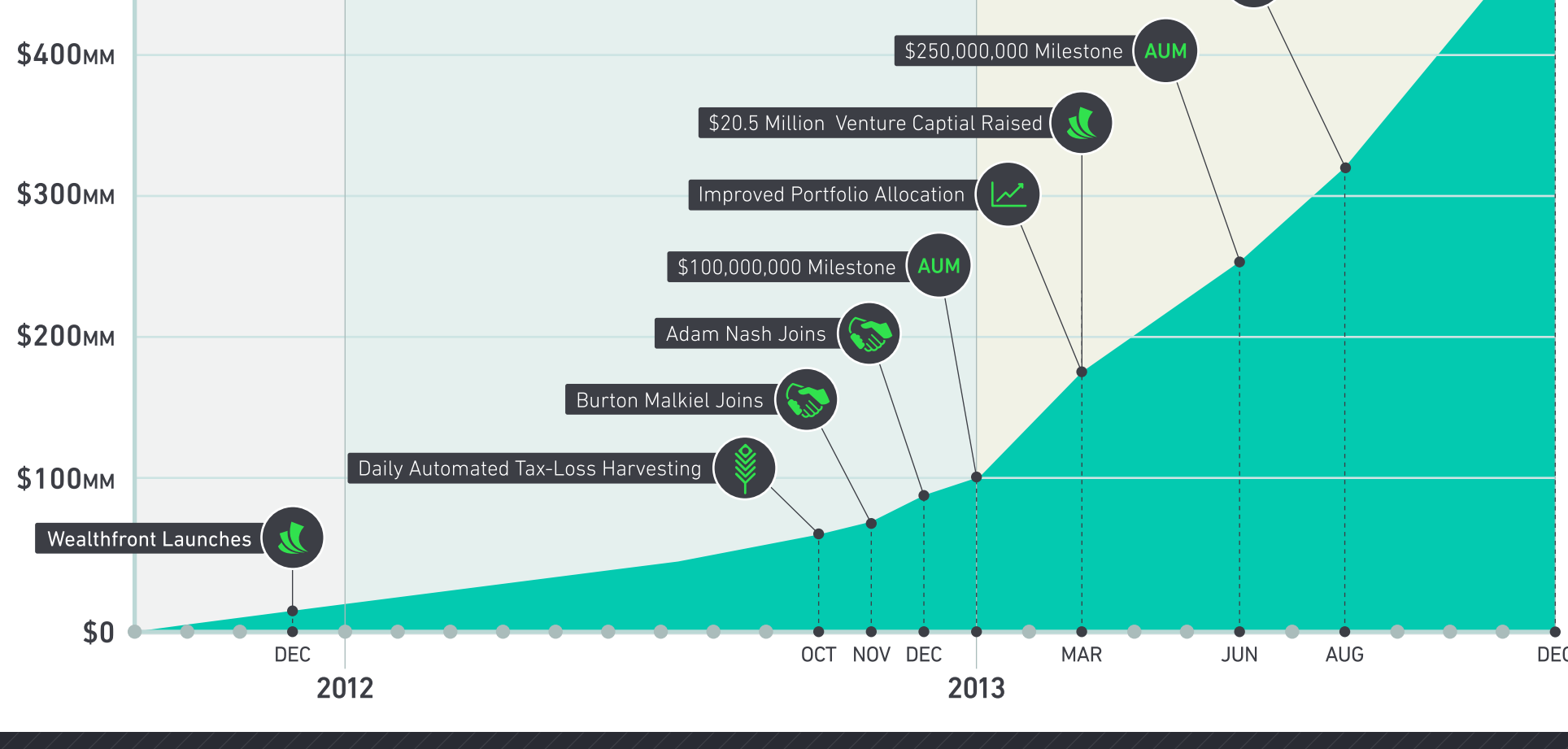
MANAGING MORE THAN

# \$500,000,000

## THANKS TO 450% GROWTH IN 2013

In 12 months, Wealthfront has grown from less than \$100 million to more than \$538 million<sup>1</sup> in assets under management, making us the largest and fastest growing software-based financial advisor.

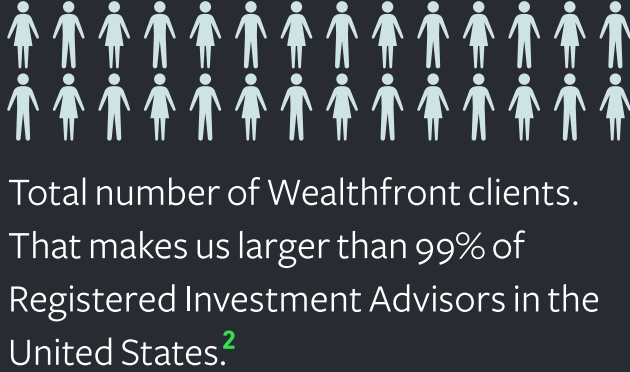
### HIGHLIGHTS SINCE OUR LAUNCH



### RAPID GROWTH & ADOPTION IN 2013

Strong growth in 2013 led to a more diverse list of clients, a sign of how software can democratize sophisticated investment services

6,000+



Total number of Wealthfront clients. That makes us larger than 99% of Registered Investment Advisors in the United States.<sup>2</sup>

\$538MM

Wealthfront's total assets under management. Wealthfront is larger than 85%+ of Registered Investment Advisors in the United States.<sup>2</sup>

Two Hundred Thirteen

Total number of CEO's, founders, presidents and owners of companies that use Wealthfront to manage their investments.

16%

The percent of Wealthfront clients with a liquid net worth greater than \$1,000,000.

58%

The percent of Wealthfront clients that are Millennials (between the ages of 18 and 35).

19

93

The ages of our youngest and oldest clients.

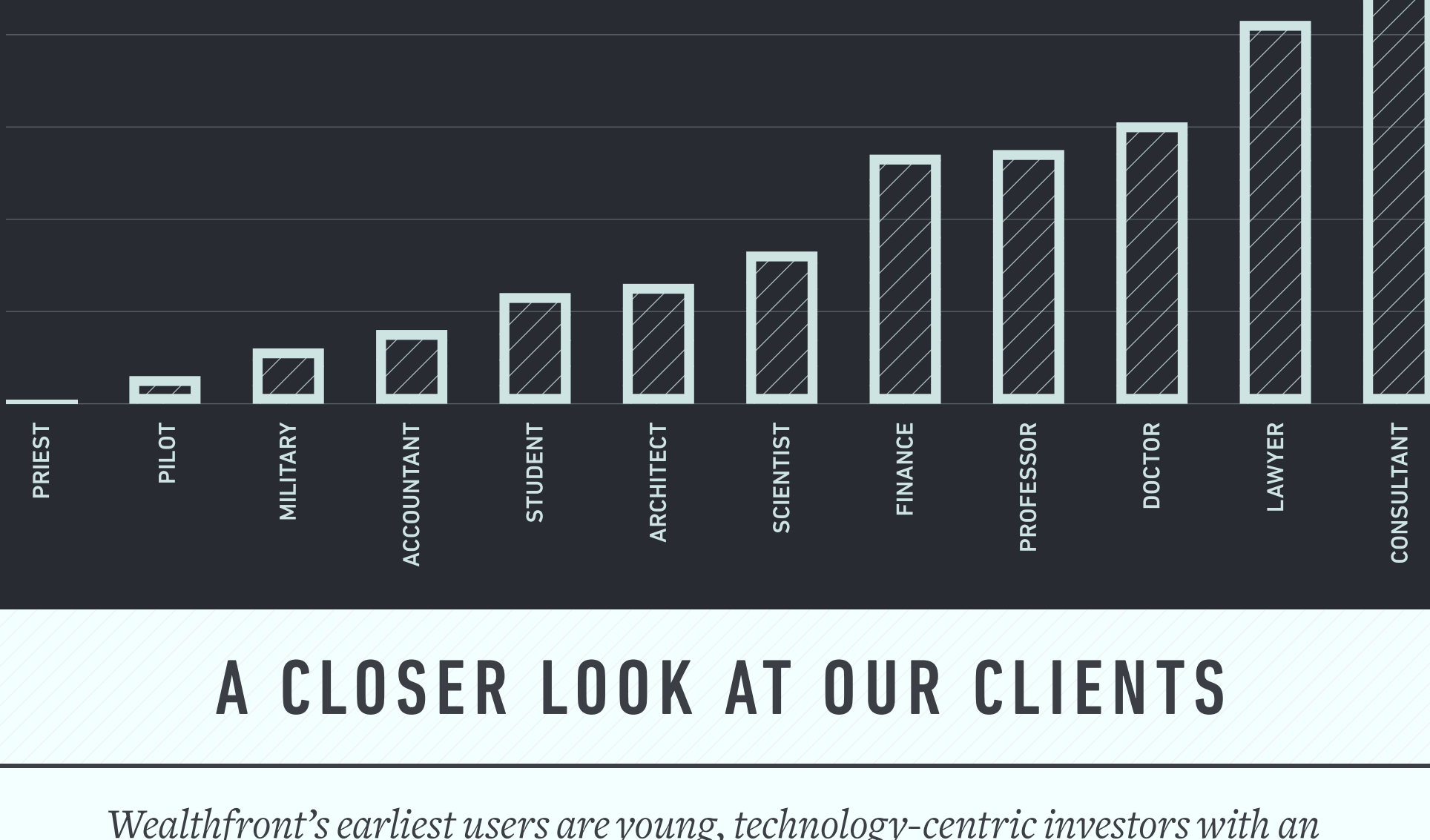


### A Wealthfront Client In Every State

Wealthfront has clients in all 50 states and the District of Columbia, making it one of the most diverse Registered Investment Advisors in the United States. The top 5 states in terms of total clients are California, New York, Texas, Washington, and Massachusetts.

### A Diversifying List of Clients

Wealthfront is not only for young technologists. Our rapidly growing list of clients includes (but is not limited to) military, professors, students, architects and even 3 priests!



### A CLOSER LOOK AT OUR CLIENTS

Wealthfront's earliest users are young, technology-centric investors with an inherent trust in software-based products and services.

\$91K

The average Wealthfront client trusts us with over \$91,000.

\$91,000

From Dec. 2012 — Dec. 2013, the average client investment increased by almost 50%.

\$5,000

Wealthfront clients have accounts ranging in size from \$5,000 to more than \$6,000,000.

### TOP 20 COMPANIES WHERE OUR CLIENTS WORK



### THE PEOPLE BEHIND WEALTHFRONT

TRUST IN OUR LEADERSHIP & TECHNOLOGY

Our team includes leading investors and academics in the field of finance from Stanford, Princeton, Harvard, Brown and Penn. Our engineering and product teams consist of former employees from companies like Facebook, Twitter, LinkedIn, Google and Apple.

### MEMBERS OF WEALTHFRONT'S INVESTMENT TEAM



**Andy Rachleff**  
Chief Executive Officer

Andy is the vice chairman of the board of the endowment investment committee for the University of Pennsylvania and is a member of the faculty at Stanford Graduate School of Business.



**Burton Malkiel, PhD**  
Chief Investment Officer

Burt is a Professor of Economics and Senior Economist at Princeton University. He is also the author of "A Random Walk Down Wall Street" and past board member of the Vanguard Group.



**Charley Ellis, PhD**  
Advisor

Charley held academic appointments at Harvard Business School and the Yale School of Management. He is also the author of "Winning the Loser's Game" and "The Elements of Investing."

200

Collective years of investing experience from our investment team.

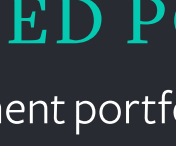
16

Investing books published by our investment team.

7

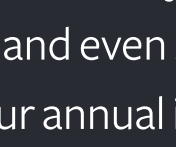
PhDs on our investment team.

### SOPHISTICATED FINANCIAL ADVICE



#### DIVERSIFIED PORTFOLIO

Wealthfront constructs an investment portfolio across 11 asset classes, including both U.S. and international stocks and bonds, natural resources and real estate.



#### TAX EFFICIENCY

Wealthfront optimizes asset allocations in your accounts based on tax status. Additionally, clients can enable daily and even stock level tax-loss harvesting, which can add an additional 1.63%<sup>3</sup> to your annual investment performance after tax.



#### LOW COST & NO COMMISSIONS

Our 0.25% of assets fee (a mere \$10/month for a \$50,000 account) is the only fee we'll charge you. There are no commissions or other account fees for a Wealthfront account and the first \$10,000 is managed for free.

### WHAT WE DID FOR OUR CLIENTS IN 2013

200,000+

The number of trades performed for free on behalf of Wealthfront clients.

\$1,700,000+

The amount of management fees saved for our clients by charging 0.25% annually instead of the typical 1.00% management fee.

\$2,400,000+

The total amount of short-term capital losses harvested.