



TAMARIND™
LEARNING

Empowering Wealth Education
for Beneficiaries and Advisors

www.tamarindlearning.com

Executive Summary



General Information

- Company Name **Tamarind Learning**
- Founded **2020**
- Headquarter **Florida (virtual) |C-Corp**
- Website **www.tamarindlearning.com**
- Structure **\$2M – \$5M**
- Stage **Series A- Growth**

Milestones

- 2022–2024**
 - Secured 4 white-label contracts (1 in 2022, 1 in 2024, 2 in 2025; 3rd pending)
 - Enterprise engagements with major financial institution
 - Expanded AI-based learning features (StewardAI) and enhanced Advisor Dashboard
 - Signed preferred vendor relationships with Morgan Stanley, UBS and Schwab
- 2025+**
 - Rolling out Founder Package (\$500K+ pipeline)
 - Scaling advisor reseller and enterprise licensing channels
 - Launching new Family Governance and Prenup Masterclass courses (Q3–Q4 2025)
 - Targeting profitability and 3x ARR growth within 24 months

Team & Leadership

- Kirby Rosplock, PhD — Founder & CEO**
Family office thought leader and practitioner; 30+ years in family enterprise and wealth stewardship. Author, speaker and consultant via Tamarind Partners; leads content strategy and client relationships.
- John P. Rosplock, MBA — CFO & COO**
Operations and finance lead; oversees commercial rollout, partnerships, and enterprise engagements.
- Todd Rothman, BS — Chief Technology Officer**
AI & ed-tech developer; leads StewardAI, course builder, and platform architecture. Prior experience building learning systems and AI tooling for education.
- Torri Hawley, MS — Chief Learning Officer**
Senior instructional designer and learning strategist; responsible for curriculum rigor and accreditation pathways.
- Hannah Nielson, BA — Senior Learning Manager**
Multi-family office experience and learning operations; drives course delivery and client success.

The Problem

- Massive intergenerational transfer of wealth (\$84T+), with beneficiaries widely unprepared
- 60–70% of family offices acknowledge education gaps, yet only ~20% have formal programs
- Existing financial education is often theoretical, generic, or not tailored to heirs/trustees
- Confidentiality and family dynamics create friction for direct, trusted learning

The Market

- TAM: \$84T+ wealth transfer tailwind; addressable market for affluent-family education expanding rapidly
- SAM: Affluent family & advisor education (\$5–10B segment for specialized programs)
- SOM: Initial North American HNW /Family office launch market (target ~\$300M+)
- Demand driven by private banks, RIAs, family office networks and advisor channels

The Solution

- AI-enabled, multimodal platform for applied wealth stewardship education
- Accredited Beneficiary Stewardship (ABS): 10-course certification for beneficiaries, trustees & advisors
- Enterprise white-label platform for banks, RIAs & family offices
- StewardAI™: personalized mentor, AI course builder & engagement analytics
- Asynchronous, advisor-managed cohorts improving engagement & retention

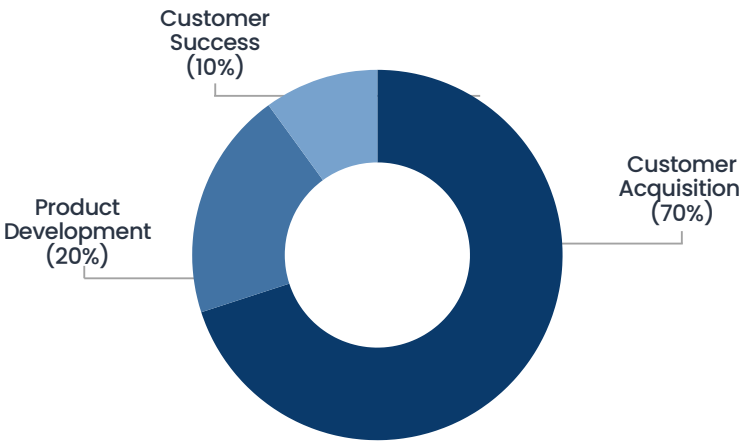
Competitive Advantage

- First mover in beneficiary & Family office education
- Proprietary curriculum by industry expert Kirby Rosplock, PhD
- AI personalization & advisor dashboards drive measurable retention
- Scalable, high-margin B2B white-label model
- Trusted under NDA by top global family offices

Business Model & Traction

- REVENUE STREAMS:**
- Individual course sales,
 - ABS program subscriptions,
 - Group/family licensing,
 - Enterprise white-label, advisor reseller programs and Founder Packages.
- TRACTION:**
- 4 white-labels (2022–2025), 5 enterprise engagements,
 - TL being vetted corporate for an 8,000 advisor financial institution; , 600–700 qualified leads in pipeline, preferred vendor relationships with major financial firms.

Use of Funds



Round

Raising \$5,000,000 (Series A, Common equity) , QSBS Treatment eligible

Exit Strategies

- Strategic acquisition by EdTech, FinTech, or wealth-management platform (3–5 years)
- IPO or private-equity recap as a later option depending on scale and category consolidation
- Attractive M&A profile: proprietary curriculum, enterprise licenses, trusted client base

Disclaimer

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Regulatory Disclosure

The principal, Juan Moreno Rovira, of Nassau Street Capital Markets LLC, is a registered representative offering securities and investment banking services through Britehorn Securities, a registered broker-dealer (member FINRA/SIPC). Britehorn Securities and Nassau Street Capital Markets LLC are not affiliated entities.



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