

# REAL INTELLIGENCE

## MEDIA CASE STUDY

*Provides wealth consultants with the means to compete with the growing use of artificial intelligence, robo-advisors, through human-centered financial planning tools and advanced sales training.*



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# In This Case Study,



## **WHO IS REAL INTELLIGENCE, LLC?**

Real Intelligence, LLC provides wealth consultants with the means to compete with the growing use of artificial intelligence, robo-advisors, through human-centered financial planning tools and advanced sales training. Using these means, wealth consultants are able to build their businesses around middle-class millionaire clients. Their training includes a 100-day habit change program with their own Dynamic Mapping certification. This certification delivers a service model that is identical to the model utilized for families with wealth of \$50 million and upwards.

## **REAL INTELLIGENCE FOUND A NEED.**

One of the many effects of the COVID-19 pandemic was the volatility of the economy. The ensuing chaos has put investors into a state of confusion. And their worries and anxieties have led to a multitude of questions. Many of these investors are still relying on the old institutional model of investing which is woefully inadequate for the financial need of individual investors and families. Many investors already turn to large firms such as Merrill Lynch and Edward Jones to make investing decisions, but they are relying on the institutional model themselves, which doesn't provide a timeline on return, the data they produce is confusing to lay people, and they can only follow the appreciation or depletion of cash flow.

## **WHILE THEY FACED CHALLENGES...**

Real Intelligence was competing with the institutional model of investing and the popularity of robo-advisors which are well known to investors. However, because of the rapidly changing investing landscape and the shortcomings they had to endure, Real Intelligence designed a new method for investing. Their new human-centric approach of investing removed the uncertainties these old shortcomings, enabling both novice and experienced investors to make informed decisions.

## **...WE PROVIDED **DISRUPTIVE** SOLUTIONS.**

Real Intelligence was providing a superior investment model alternative that financial advisors could utilize to compete with robo-advisors and large financial entities. Capitalizing on this highly relevant and critical disruption, we concentrated on placements within highly relevant industry publications as well as some of the most popular financial media outlets with large finance industry professionals. We stressed their highly disruptive and innovative approach to investing and how it would overcome the shortcomings of the current models, giving investors the means to make well-informed financial decisions.

## MEDIA EXPOSURE METRICS

Over the course of their intensive campaign, Real Intelligence garnered a total of 30 placements in highly targeted media providers that included industry publications, radio programs and popular news providers.

This amounted to an exposure aggregate of about 827 million potential views from financial industry media news sources, radio shows, and popular new websites. Based on that aggregate and the expected industry standard of 2.5% for actual views, about 20.7 million of Real Intelligence's target audience (financial and business professional and decisionmakers) read or listened to their news stories.

- Jeff Mount, President of Real Intelligence, hosted an "Ask Me Anything" session on Reddit, which attracts a massive audience, an average 430 million active users every month. Jeff took this opportunity to provide advice and knowledge on a wide variety of financial topics, fully showcasing his thought leadership and industry expertise to a varied audience in real time.
- Jeff also contributed articles to Newsmax Finance 11 times during his campaign with topics ranging from financial planning amidst COVID-19, robo-advisors, institutional methods of investing, the dangers of inflation, and more. In every case Jeff received huge exposure, with a potential audience exposure of about 17.1 million unique visits per month for every one of his articles.
- Financial Advisor Magazine, which targets financial advisors, financial planners, and investment advisors, averages about 110,000 unique visitors each month, featured Jeff in a highly relevant article that showcased his experience in risk management and how it can adapt to crises such as COVID-19 as well as his Dynamic Mapping app, which can help users take into account a range of possible risks to their portfolios.

Jeff Mount and Real Intelligence stories can be found in these highly targeted media outlets:

- Supply & Demand Chain Executive: [AI Robots to Manage \\$4.6 Trillion by 2022: Financial Services Risk Extinction in Age of Tech](#)
- Investor Intel: [Jeff Mount on helping the "middle-class millionaire" feel more confident](#)
- Best Company: [Millennials and Credit Card Debt \[9 Myths That Hold You Back\]](#)
- Forbes: [This Is How Your Work, Spending And Life Changes From This Point Forward](#)
- Global Banking & Finance Review: [Managing liquidity risk during a pandemic](#)
- Insurance News Net: [Majority Of Americans Plan Financial Changes Post-COVID-19](#)
- Medium: [Jeff Mount Of Real Intelligence: "Investing During the Pandemic; What Should I Do with My Money Considering All of the Volatility and Uncertainty Today"](#)
- ValueWalk: [POST-COVID RISKS FROM OUTDATED INSTITUTIONAL MODELS](#)
- FinTech Buzz: [Fintech Interview with President, Real Intelligence – Jeff Mount](#)
- KMJ NOW: [Buckle Up! These Bumps Are Really Going to Hurt Investors!](#)

Through every article placement and interview, we positioned Jeff Mount as an industry thought leader within the finance industry, highlighting his vast experience and know-how regarding the shortcomings of traditional methods for investment and touted his disruptive solution – his humancentric approach – to overcoming those limitations, empowering investors to make more informed decisions.

### **...AND REAL INTELLIGENCE RESPONDED!**

“I can’t begin to tell you how pleased I am with the experience of working with [JOTO PR], and your team. We have just begun this campaign and the buzz has certainly been extraordinary! Thank you. The day you and I spoke last Fall to discuss how your unique *Anti-PR* method would be a better way to “disrupt” the financial services business than just advertising was the beginning of something special. I was in agreement with you then, and am more convinced than ever, that this was the right business decision. I am proud to call you my business partner.”

*~ Jeff Mount, President, Real Intelligence LLC*





REAL INTELLIGENCE, LLC

## ABOUT REAL INTELLIGENCE, LLC

Real Intelligence LLC is the brainchild of entrepreneurs and industry experts Jeffrey Mount and Mike Helgesen. With 55 combined years of industry expertise and the alliance of both their innovations: Dynamic Mapping and the Essential Family Office training programs—Real Intelligence LLC is poised to offer a complete essential tool kit to the next generation of elite Financial Advisors. With strategic, industry proven training, patented technology, and an unprecedented lead generation opportunity the paradigm of financial services is shifting from status-quo. This human-centric approach to financial planning is a consultant's greatest tool to combat the competitive threat of free programs through robo-advisers and the dangers of irrelevancy. To Learn more visit: [www.realintelligence360.com](http://www.realintelligence360.com).

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