



More Ways to Win

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## Building Your Capitalogix Joint Venture

10+ years ago, Capitalogix started building Artificial Intelligence (AI) capabilities for ourselves. In the process of refining these capabilities, we realized that the skills we'd fostered were transferable to other industries – and that we could grow our impact by helping other companies leverage what we do best.

AI is reshaping the world, and we're primed to be at the forefront of this gold rush. Like with any gold rush, you can expect a swarm of half-baked ideas and straight-up scams to offer you the golden ticket.

Luckily, Capitalogix has been here, navigating this rapidly changing space, since before most people could spell AI. We're a reliable partner to help you get ahead of the game and avoid the common pitfalls.

When you invest in Capitalogix, and become a Founding Partner, one of the key benefits is the right to build a joint venture with us.

Inevitably, your industry will change. You can't control whether it happens ... but you can choose to lead the charge and stake your claim.

While pioneers often get arrows in their backs, we've explored the territory thoroughly for you. You can benefit from an early mover advantage without making the mistakes your competitors will.

Before we start building your idea, here are a few things to help you think about the practical realities of technology adoption and what to expect about the joint venture process with Capitalogix.

There is a recipe for success. You have to walk before you can jog, and jog before you can run. So, it's important that we build out the plan for this opportunity the right way.

We'll start with understanding your business and your numbers ... even the ones you don't think are important. Once we understand your "why", your problem statement, and your value position, we can start to move forward.

That's when the real exciting stuff happens.

Keep reading to learn more.

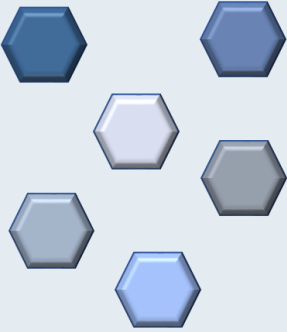
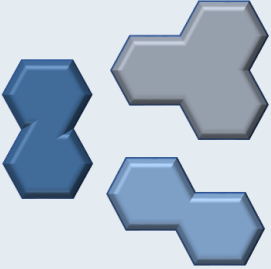


## The Technology Adoption Model

Understanding human behavior and what stays the same is the secret to technology adoption at scale.

In general, it's not the best technology that wins ... it's the most popular. That means you can "win the game" by choosing technology that appeals to human nature.

To help entrepreneurs adopt new technologies and create their desired futures, we've developed a framework that enables you to turn thoughts into things, and explains how ideas scale with respect to capabilities, audience, and monetization.

The four base stages are Capability → Prototype → Product → Platform.

Technology Adoption Model			
Capability	Prototype	Product	Platform
A fundamental building block of skill or ability that can stand alone or become the foundation for something much bigger.	A preliminary model developed by stacking or bundling different capabilities to create more opportunities, enhance the ability to perform a task, or achieve a goal.	A mature collection of capabilities packaged together to help someone achieve a specific, known result. It is designed to meet the needs of a particular audience and to be robust, reliable, and resilient.	A system or infrastructure offering a variety of capabilities that can be used by unknown individuals to achieve outcomes that the platform creator did not initially anticipate.
			

These are the building blocks of technology adoption that will help take your business to a new level.

While the Technology Adoption Model Framework stages are important, the ultimate takeaway is that you don't have to predict what's coming, only how human nature works in response to the capabilities in front of them.

It's a bit cliché, but to paraphrase Wayne Gretzky, you just have to skate to where you think the puck is going to be. The key is to lean in the right direction, and you only have to be a little ahead.

Desire fuels commerce. Commerce fuels progress ... and opportunities, talent, and resources follow quickly. That is why the path forward is paved with energy and momentum.

The Technology Adoption Model is about predicting the capabilities people will want ... rather than which technologies will win. Think of it as anticipating or recognizing the natural path forward.

It is easier to ride the wave than it is to fight nature.

Each stage is about the opportunity to scale desire and adoption. The goal shouldn't be to build a technology ... it should be to leverage desire to get to the next stage.

If you understand what is coming, you don't have to build it. Instead, you can figure out what to build that will add value or enhance it. Think of this as standing on the shoulders of giants.

This model is fractal. It works on many levels of magnification or iteration. What first looks like a product is often later seen as a prototype for something bigger.

## Applying The Model to Capitalogix

As we move into what the actual Joint Venture will look like, it's helpful to see how we apply the technology adoption model in our business.



This chart means a lot of different things to us, but it's a helpful model for what innovation looks like for us and what it can look like for your business.

At the top, is **Amplified Intelligence**. The goal is to move from guessing, to acting on what we know and can control. The three words at the top of each circle are the verbs (or actions) that help build toward the goals. We get to Amplified Intelligence by discovering new opportunities, challenging the status quo, and innovating where necessary. These three actions start the JV process.

Once you've started to innovate, the goal is to transform that spark into a flame that won't go out ... your **Sustainable Edge**. That happens by fortifying your ideas, adapting to what the market tells you, and growing your capabilities into prototypes, products, and then platforms.

The intersection of Amplified Intelligence and a Sustainable Edge is **Compounded Insights**. We've taken the lessons we've learned, and extrapolated from them, built new capabilities, and then continued to use that as fuel for more learning. It's a perpetual flywheel.

Think of these two circles as a discovery phase, a testing phase, and then a deployment phase in your business. We've identified opportunities, then built something based on them, and next comes the fun part ... turning them on and letting them perform.

Deployment often takes time, yet follows a repeatable process ... build, scale, and refine. Once you create something that works, you scale it until it breaks, then you fix or enhance it. Over time, this process results in an **Autonomous Platform** that becomes the foundation to support new opportunities and businesses – and perhaps even to transform your industry.

It's how we built our Capitalogix Insight Engine, and it's the foundation for us working together.

When all three circles start to work together, your business can move forward on them simultaneously, creating not only **Strategic Certainty** and a **Competitive Advantage**, but the **Exponential Results** and longevity we're all looking for in our businesses.

It's a powerful flywheel for success. Now, let's look at what our process looks like for you.

## The Capitalogix Joint Venture Process

We offer Founding Partners the right to create a joint venture with us, leveraging our AI expertise and expanding your capabilities.

We provide access to our IP and align our resources to product manage your project vision. These joint ventures offer reciprocal opportunities for growth and innovation, adding value and new insights back into our platform.

Some Partners choose to create a financial product based on our existing products, but we've also helped develop new projects in the medical, wearable, and marketing spaces so far. We're rapidly progressing in new industries, including blockchain and others.

Here is an outline of the process we usually walk through. Of course, each project is different.

## **The Capitalogix Joint Venture Process**

1. **Discover** – We start with the end in mind, using your long-term goals to reverse engineer a comprehensive vision and strategy. We utilize a series of models and frameworks carefully selected to analyze your business and opportunities. Ultimately, this spec and scope process is the foundational piece, ensuring we’re building something we understand and can justify. This process can be started before investment to ensure fit.
2. **Plan** – Together, we will outline the project and the plan, including evidence of success, and what rollout looks like. Along the way, we’ll schedule regular meetings to focus on project viability and creating a business model that accounts for practical venture aspects and expected outcomes. The key is building the right things in the correct order, while avoiding distractions and waste. We start with improving what you’re already doing, before moving on to new capabilities.
3. **Prototype** – Ideas crystallize into capabilities, prototypes, products, and then platforms. At each stage, there is an element of making it up and then making it real. Then, we are constantly testing, iterating, and imagining what is possible – and figuring out how to measure that it accomplishes what it could or should do to create a transformation.
4. **Develop** – Once we’ve ironed out the kinks in the testing phase, it’s time to build an audience and launch the product. Feedback is key. A big part of technology adoption is based on human nature. We have been through this before, and we have many resources ready to help. Once we’ve gotten it working manually, we can increasingly remove the human
5. **Scale** – We talked about making it up and making it real. The money comes from making it recur. We focus on growing ongoing revenue through long-term collaborations to ensure sustained success and expansion opportunities from the initial investment.
6. **Repeat** – After stacking a few wins from low-hanging fruit, we’re ready to think bigger, and dive deeper into how to make a Platform to transform the business and the industry. At this stage, the process repeats, just at a higher and more lucrative level. Meanwhile, the business can better deal with the growth and success because so much of what took their time has been automated.

### Closing Thoughts

AI means different things to different departments, let alone different businesses. It's challenging to figure out where to start and what to systematize or automate.

Our team can guide you into integrating new technologies into your business efficiently, helping you uncover hidden insights and new opportunities, making your organization more efficient and effective.

We can then guide you into new products that will improve your capabilities and your company's trajectory.

We're excited to get started. If you already have an idea, let us know, and we can start the discovery process.

Below, we've included an appendix with instructions on becoming a Founding Partner and two case studies to help you imagine what's possible.

## Appendix A: How to Become a Founding Partner

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*In the past, businesses scaled by headcount. Now, companies scale with top talent, innovative ideas, and advanced technology. We plan to launch many of these businesses to take advantage of the early opportunity.*

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This is your official invitation to be part of the Capitalogix Inner Circle. Click the link to request your Offering Documents, block out time for our call, and get ready for a productive partnership.

AI empowers businesses to do more with less. Early adopters of AI will gain a significant competitive advantage by automating tasks, enhancing customer experiences with personalized recommendations, and making data-driven decisions that lead to cost savings and increased revenue. Integrating AI into your business will propel your organization forward by unlocking new levels of efficiency, effectiveness, and certainty.

We help businesses achieve exponential results. We do this by multiplying their competitive advantages, delivering new levels of strategic certainty, and accelerating progress through powerful insights that build upon each other.

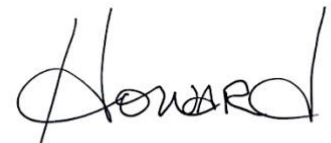
### **Here's What To Do Next:**

**Step 1:** Click [here](#) to request your Offering Documents. It will take you directly to my calendar.

**Step 2:** Choose a convenient time block for our call.

**Step 3:** Check your email for confirmation of our call and the calendar invite with a Zoom link.

Let's make great things happen together!



Howard Getson

## Appendix B: Capitalogix Case Studies: A Look At Two Exciting Joint Ventures

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Joint ventures are an exciting direction for us. Not only do they contribute to enhancing our internal platform and expertise, but they also bring new people and opportunities into our ecosystem.

While there are multiple in the works, I want to highlight two that are gaining momentum. One in the financial space, and one in the digital marketing space.

Hopefully, they will give you an idea for your joint venture or collaboration.

### Wesley Sierk and Captive Insurance

Wes Sierk is an Inner Circle investor. He's also the president of Risk Management Advisors (RMA), the sixth-largest manager of captives in the world. They have around 1,000 captives on their management platform.

Wes also has a network of clients and partners looking for new ways to capitalize on the new world of AI.

#### **The Opportunity**

Wes is launching a fund for captive insurance companies, with a higher expectancy than cash, but lower volatility than our standard products. Their money will still be in the captive, but clients will be able to do something more aggressive than leaving it in cash. Meanwhile, the profits are still protected from tax.

It will start as an opportunity for his clients but will evolve into something he can offer to others as an incentive to create captives.

Wes plans to start the fund with \$20MM and grow it rapidly from there.

#### **What We Are Doing for RMA**

Our role in this venture extends beyond providing the necessary fund technology and the autonomous trading platform. We are collaborating to develop the legal, tax, and compliance frameworks essential for a smooth and secure operation. By combining our capabilities with this solid structure and foundational elements, we dramatically reduce the time and cost it takes to unlock the full potential of this exciting opportunity in the field of captive insurance.

## Medialogix – Digital Marketing and Advertising

Many lucrative business opportunities are hidden in plain sight. For example, when most people think about digital marketing and advertising, they imagine email sequences, landing page funnels, and using ChatGPT to generate a headline or a blog post to get someone to their website to buy something. However, some of the most successful digital marketers have figured out how to make money even when nobody buys.

What do these things have in common: rhinoplasty, weight loss injections, credit cards, slab leak repair, and fungus treatment? The answer is they are all high-value keywords in Google's advertising network. A digital marketer specializing in **search traffic arbitrage** speculates on which of those they are more likely to acquire traffic at a lower cost than what these ads pay out.

A year ago, we started a collaboration with a company that generated over \$40MM+ in top-line revenue from Search Traffic Arbitrage. It is a fascinating opportunity.

Search traffic arbitrage is a strategy that re-directs traffic from social platforms like Facebook, Instagram, LinkedIn, X, or TikTok to view targeted content that displays ads from a platform like Google. The goal is to earn more money from the ads displayed than it costs to generate the traffic.

Search traffic arbitrage requires understanding search engine advertising and website monetization strategies. However, unlike traditional ad businesses, the client is the ad provider, for example, Google, rather than the business purchasing the ad displayed. In addition, the goal is simply to direct traffic to view content relevant to highly ranked topics, rather than to sell a product or service.

Consequently, there is no need to invest in product development or inventory management, which can be time-consuming and expensive. It also means the content generation strategy can focus on quality rather than selling.

Another advantage of this model is the flexibility it provides. It is possible to scale the business up or down depending on market conditions and other factors. This makes it easier to create low-risk, high-reward opportunities.



## **The Opportunity**

Our thesis was that we could use AI to optimize, accelerate, and automate the complete process.

We recognized that buying and selling traffic is similar to trading financial markets. Ultimately, it comes down to being able to measure and respond to whether you are making money or losing money ... and that means being good at real-time opportunity identification and risk management. The words are different, but the concepts are similar (sensible diversification, risk-adjusted return, concentration risk, value at risk, volatility, allocation strategies, real-time expectancy scores, etc.).

While it's still early, we're already excited with the results, and what the right partners can do to help us scale. After establishing ourselves in the Search Traffic Arbitrage space, we can branch out to other specialities. We've started with a great niche, but the space as a whole is also well-funded and ready for disruption.

## **What We Are Doing**

Our new venture, Medialogix, aims to capture and create proprietary data through an autonomous collection of tools and modules. Our platform will help identify, analyze, and execute media buying and selling strategies, and apply cash and risk management strategies in the ad-tech and marketing-tech industries.

Even dominant players in this game currently rely on basic technology (spreadsheets, databases, etc.) for their day-to-day operations. This manual approach requires a significant workforce to manage, hindering their ability to extract insights from data and automate processes. To scale their business, they need a platform that empowers their team and automates their search arbitrage buying process.

The strategy is simple. We are bringing advanced technologies and proven solutions from a more mature industry to a less mature industry ... and the result is a sustainable competitive advantage.

Our platform will make Search Traffic Arbitrage an almost entirely autonomous process.

## **Other Opportunities: [AI In Healthcare & Longevity](#)**

We also see massive opportunities in areas like healthcare. We haven't launched anything in this area yet. However, we have begun the exploration process with several potential partners.

Some of the expected uses for AI are analyzing data to assist with diagnostics, personalized medicine, and treatment planning. It can also help manage patient care and administrative processes. And AI-powered chatbots and virtual assistants can also handle many patient inquiries without human intervention.

Some of the reasons that healthcare, longevity, and age reversal are likely to benefit the most from AI and exponential technologies are that they are open to digital transformation and have the capacity to invest in these technologies.

As technology continues to advance at an exponential rate, the possibilities for improving our health, increasing our lifespan, and even reversing the aging process are becoming increasingly realistic.

Artificial intelligence (AI) and other exponential technologies are poised to revolutionize the healthcare industry, starting with advancements that will impact the standards of care and service ... but will lead quickly to more personalized and effective treatments, early disease detection, and even age reversal.

The advancement of AI technology has led to a surge in healthcare innovation.

2024 will be a transformative year in healthcare AI, revealing its potential for broad medical applications and prompting the development of specialized models.

The rapid evolution of AI has underscored the importance of a basic yet robust understanding of AI among healthcare professionals, not for building these technologies but for their safe and effective application in healthcare settings. Adoption is inevitable!

Actions have consequences ... so does inaction. Most professionals don't understand that the goal only needs to be staying slightly ahead of the crowd. The increase in opportunities, money, and outcomes will help them stay ahead and transform their practice and the quality of care they can provide.

In the long term, one of the most promising applications of AI in healthcare is in disease detection and diagnosis. AI algorithms can analyze vast amounts of medical data, including patient histories, lab results, and imaging scans, to identify patterns and make accurate diagnoses. These advances will lead to earlier detection of diseases and more targeted treatments, improving patient outcomes and reducing healthcare costs. It will also lead to personalized treatment plans and more comprehensive care.

While those technologies continue to get better, here are some of the more immediate opportunities we're looking at:

- Creating **Process Playbooks** that leverage automation and AI to help medical practices exceed effective standards of care both front-stage and backstage. This class of solutions improves practical and business outcomes and helps avoid errors, omissions, and discretionary mistakes.
- Using **Outcome Integrity Trackers** to log decisions, actions, and results, hopefully improving and standardizing processes and outcomes. This capability will evolve into the ability to measure the

difference between skill and luck reliably and to the creation of accurate recommendation engines with real-time expectancy scoring.

- **Capture, Calculate, and Curate Custom Metrics**. Much of what happens each day is lost. Finding a way to save this data creates, expands, and augments a valuable new asset that is valuable itself, helps solve complex problems, and leads to new products, services, and solutions.
- A **Single Integrated Source of Trusted Data** that is accurate, complete, and up-to-date. Together, that data becomes the foundation for building new models, metrics, validations, certification, and compliance solutions.

Even though we just talked about healthcare, the principles apply to almost any business.

People won't get replaced by AI. People will get replaced by people using AI.

Hope this helps.