

FT PARTNERS FINTECH INDUSTRY RESEARCH

June 12, 2019

Alkami

Alkami Raises \$55 million in Series E Financing Led by General Atlantic and MissionOG



GENERAL
ATLANTIC

MISSIONOG

Overview of FT Partners

- Financial Technology Partners ("FT Partners") was founded in 2001 and is the only investment banking firm focused exclusively on FinTech
- FT Partners regularly publishes research highlighting the most important transactions, trends and insights impacting the global Financial Technology landscape. Our unique insight into FinTech is a direct result of executing hundreds of transactions in the sector combined with over 17 years of exclusive focus on Financial Technology

FT Partners' Advisory Capabilities



FT Partners' FinTech Industry Research

FINTECH RESEARCH & INSIGHTS

- In-Depth Industry Research Reports
- Proprietary FinTech Infographics
- Monthly FinTech Market Analysis
- FinTech M&A / Financing Transaction Profiles



The Information

Named Silicon Valley's #1 FinTech Banker (2016) and ranked #2 Overall by The Information



Ranked #1 Most Influential Person in all of FinTech in Institutional Investors "FinTech Finance 40"



THE M&A ADVISOR

Numerous Awards for Transaction Excellence including "Deal of the Decade"

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Alkami Raises \$55 million in Series E Financing

FT PARTNERS RESEARCH

Alkami

Transaction Overview

Transaction Summary

- On June 10, 2019, cloud-based digital banking solutions provider Alkami Technology announced it had raised \$55 million in a Series E funding round
 - Existing investors General Atlantic and MissionOG led the round
 - Other existing investors S3 Ventures and Argonaut Private Equity also participated in the round
 - To date, Alkami has raised over \$225 million in funding
- Alkami provides a digital banking platform for more than 130 financial institutions across the United States, and its clients have over 6 million registered users on the platform
- The Company plans to use the latest funds to accelerate investments in its cloud solutions for U.S. banks and credit unions ⁽¹⁾
 - Alkami's platform gives traditional institutions the tools to drive their digital strategies in a space increasingly under pressure from larger banks and newer FinTech entrants ⁽¹⁾
- After its previous capital raise ([\\$70 million Series D financing in 2018](#)), Alkami expanded its team across all departments and doubled its office space at its Plano headquarters ⁽¹⁾

Management Commentary

"In a few months we will celebrate our tenth anniversary. We are very honored and excited about the support of our existing investors evidenced again by this round. Their long-term commitment and support has allowed us to continue to boldly invest in innovation, people, and best-in-class service. They remain one of Alkami's most potent sources of strength and results. Our remarkable clients are another potent source of strength outperforming the market on key engagement, growth and profitability dimensions by a significant margin. Together we are creating and delivering winning digital solutions to our clients' customers, members and businesses essential in today's digital age."

Alkami

Mike Hansen
CEO



Investor Commentary

Alkami continues to experience incredible growth as a leader in the large and growing digital banking market. We believe Alkami will continue to drive the industry forward with new innovations in user experience, product features, platform architecture, and data security. We are proud to continue our strong partnership with Alkami and its talented executive team.

 GENERAL ATLANTIC

Raph Osness
Vice President



Alkami Raises \$55 million in Series E Financing

FT PARTNERS RESEARCH

Alkami Overview

Alkami

Company Overview

Alkami

CEO: Mike Hansen
Headquarters: Plano, TX
Founded: 2009

- Alkami provides online and mobile banking solutions for credit unions and banks
 - The Company offers a flexible, secure and customizable digital banking platform
 - The cloud-based platform includes retail and business banking, mobile banking, bill pay, personal finance management (PFM), Person-to-Person payments and more
 - Customers can build an interface to their own specs using the Alkami platform's SDK and API's
- Nearly 130 financial institutions across the United States use Alkami's digital platform, with over 6 million registered users
- Alkami was ranked 284th overall in the 2018 Inc. 5000 Fastest Growing Companies, as well as 78th on Deloitte's 2018 Technology Fast 500

"Alkami is the leader in the mobile banking space. They understand better than anyone where the market is going."

-Connexus Credit Union

Products & Services Overview

Digital Banking Solution for Banks and Credit Unions



Enhanced
Retail Banking



Integrated Mobile
Banking



Business
Banking



Intelligent Content
Delivery

Alkami's platform is customizable and extensible...



- ✓ Customizable user interface
- ✓ Create your own providers
- ✓ Build out new web apps and widgets
- ✓ Develop your own native features

Alkami Raises \$55 million in Series E Financing



Selected Financing & Valuation History



Source: Company press release, FT Partners' Proprietary Transaction Database, PitchBook

Alkami Raises \$55 million in Series E Financing

FT PARTNERS RESEARCH

Alkami

General Atlantic Overview

Overview



Jonathan Korngold
Managing Director



Paul Stamas
Managing Director



Alex Crisses
Managing Director



Raph Osness
Vice President

Locations

- New York, NY (HQ)
- Greenwich, CT
- Palo Alto, CA
- Sao Paulo, Brazil
- London, UK
- Amsterdam, Netherlands
- Munich, Germany
- Mumbai, India

About

- Founded in 1980, General Atlantic has made 335 investments and has \$31 billion AUM
- Aims to be an active lead investor with significant minority ownership, that works with management teams to meaningfully change outcomes
- Primarily invests in companies with strong growth and maturity

Investment Preferences

Investment Criteria

Fund Size:	\$3,290 mm (Buyout); \$3,700 (Growth)
Fund Raised:	2018 (Buyout); Evergreen (Growth)
Investment Range:	\$50 – 500 mm
Revenue:	NA
EBITDA:	NA

General Preferences ¹

Control:	Majority, Minority
Geography:	North America, Europe, Asia / Pacific, Latin America
Transaction Type:	Venture, Growth, Buyout, Recapitalization, PIPE, Secondary
Industry Focus:	Consumer, Financial Services, Healthcare, Technology

Selected Recent Investments / Exits

FinTech / Financial Services Investments ²

Date	Company	Deal Amt. ³	Board Rep.	Sector
06/19	Alkami (Series E)	\$55	Raph Osness	Bnkg
06/19	NoBroker (Series C)	51	NA	Bnkg
05/19	PayClip (Growth)	20	NA	Pymts
03/19	Opendoor (Growth)	300	NA	Bnkg
03/19	Chime (Series D)	200	NA	Bnkg
12/18	Invoice Cloud (Buyout)	NA	NA	FMS
11/18	QuintoAndar (Series C)	64	NA	Bnkg
11/18	Property Finder (Growth)	120	NA	Bnkg
09/18	Opendoor (Series E)	725	NA	Bnkg
08/18	WPS Advisory (M&A)	NA	NA	CapMkts
08/18	Wealth Advisors (India) (Buyout)	57	NA	CapMkts
07/18	Greensill Capital (Growth)	250	Gabriel Caillaux	CapMkts
07/18	European Bank for Financial Services (Buyout)	177	NA	Bnkg
06/18	IIFL Wealth Management (Growth)	110	NA	CapMkts
06/18	SigFig (Series E)	50	Paul Stamas	CapMkts
06/18	Opendoor (Series E)	325	NA	Bnkg
06/18	Ant Financial (Series C)	14,000	NA	Pymts
01/18	Benevity (Growth)	NA	Alex Crisses, David George	Pymts

Source: Company website, PitchBook

1) Italics indicate preferred control / geography

2) * denotes M&A exit; ** denotes IPO exit

3) Deal Amount in mm

FT Partners – Focused Exclusively on FinTech

FT PARTNERS RESEARCH

Selected FT Partners' Research – *Click to View*

June 25, 2018

FT PARTNERS
TRANSACTION ANNOUNCEMENT

FT PARTNERS is Pleased to Announce its Role as IPO Advisor to

GreenSky™

in its
\$1,010,000,000
Initial Public Offering

for a total enterprise value of
\$4,500,000,000

The Only Investment Bank Focused Exclusively on FinTech

San Francisco • New York • London

GreenSky Raises \$1 billion in its IPO

January 23, 2019

FT PARTNERS
TRANSACTION ANNOUNCEMENT

FT Partners is Pleased to Announce its Role as Sole Strategic and Financial Advisor to

ZAFIN

in its Series B Financing led by

Beedie/ **VISTARA** ACCENTURE VENTURES

for total consideration of
\$17,200,000

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San Francisco • New York • London

Zafin's \$17 million Series B Financing

August 27, 2018

FT PARTNERS
TRANSACTION ANNOUNCEMENT

FT Partners is Pleased to Announce its Exclusive Role as Strategic and Financial Advisor to

deserve

on its Series C financing led by

SallieMae

for total consideration of
\$17,000,000

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San Francisco • New York • London

Deserve's Series C Financing Led by Sallie Mae

August 15, 2018

FT PARTNERS
TRANSACTION ANNOUNCEMENT

FT Partners is Pleased to Announce its Exclusive Role as Strategic and Financial Advisor to

VITRUVIAN PARTNERS

on its minority investment in

DEPOSIT SOLUTIONS

with participation from new and existing investors

for total consideration of
\$100,000,000

The Only Investment Bank Focused Exclusively on FinTech

San Francisco • New York • London

Vitruvian Partners' Investment in Deposit Solutions

FT PARTNERS FINTECH INDUSTRY RESEARCH

April 10, 2019

branch

Branch Raises \$170 million in Series C Equity and Debt Financing Led by Foundation Capital and Visa

foundation capital **VISA**

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San Francisco • New York • London

Branch Raises \$170 million in Series C Equity and Debt Financing

FT PARTNERS FINTECH INDUSTRY RESEARCH

March 6, 2019

chime

Chime Raises \$200 million in Series D Financing Led by DST Global

DST

The Only Investment Bank Focused Exclusively on FinTech

San Francisco • New York • London

Chime Raises \$200 million in Series D Financing

FT PARTNERS FINTECH INDUSTRY RESEARCH

May 31, 2019

SoFi

SoFi Raises \$500 million in Financing Led by Qatar Investment Authority

QIA **QATAR INVESTMENT AUTHORITY**

The Only Investment Bank Focused Exclusively on FinTech

San Francisco • New York • London

Starling Bank Raises \$97 million in Series C Financing

FT PARTNERS FINTECH INDUSTRY RESEARCH

March 18, 2019

silvergate BANK

Silvergate Bank Files for its IPO on the New York Stock Exchange

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San Francisco • New York • London

Silvergate Bank Files for its IPO

[VIEW MORE FT PARTNERS RESEARCH](#)





















FT Partners – Focused Exclusively on FinTech

FT PARTNERS RESEARCH

Significant Experience Advising Large Financing Rounds and “Unicorns”

FT Partners has a history of advising on some of the largest financing transactions in the FinTech space

Representing numerous FinTech “Unicorns” above \$1 billion valuations

Company	Amount Raised	Selected Prominent Investors in FT Partners Led Rounds
 stone ^{co}	\$1,400,000,000	Accel DST VISA ANT FINANCIAL
 GreenSky™	1,010,000,000	ICONIQ RCP REVERENCE CAPITAL PARTNERS TEMASEK
 MERCURY®	420,000,000	BainCapital PRIVATE EQUITY TPG PIMCO
 GreenSky™	300,000,000	BainCapital VENTURES INSIGHT PARTNERS Premji Invest
 avidxchange	300,000,000	CDPQ Great Hill PARTNERS
 MARQETA	260,000,000	capitalG CIBC Scotiabank®
 avidxchange	253,000,000	nyca QED INVESTORS khosla ventures
 Liquidnet	250,000,000	KeyBank WELLINGTON MANAGEMENT ING BBVA
 square trade™ protection plans	238,000,000	maveron Santander InnoVentures nabventures nab
 checkout.com	230,000,000	ADAMS STREET PARTNERS Elavon BV THIEL
 GreenSky™	200,000,000	Redpoint PayU edbi
 nmi	150,000,000	mastercard COATUE QUESTMARK PARTNERS SUMMIT PARTNERS
 stone ^{co}	145,000,000	SILVERLAKE PARTHENON CAPITAL PARTNERS
 ADDEPAR	140,000,000	
 Kabbage	135,000,000	
 Remitly	115,000,000	
 TradingScreen SIMPLIFYING GLOBAL MARKETS™	110,000,000	
 stone ^{co}	100,000,000	
 POYNT	100,000,000	
 CHROMERIVER	100,000,000	

FT Partners – Focused Exclusively on FinTech

FT PARTNERS RESEARCH

Proven Success in the Bank Technology Space

Card-Issuing / Processing Platform

Financial Technology Partners LP
FTP Securities LLC
is pleased to announce its role as
exclusive strategic and financial advisor to



in its Series E financing led by

COATUE

with participation from new investors



LONE PINE CAPITAL

for total consideration of

\$ 260,000,000



The Only Investment Bank
Focused Exclusively on Financial Technology

Online Banking

Financial Technology Partners LP
FTP Securities LLC
is pleased to announce its exclusive role as
sole strategic and financial advisor to



CORILLIAN

in its sale to

CheckFree®

for approximately

\$ 245,000,000



The Only Investment Bank
Focused Exclusively on Financial Technology

Mortgage Technology

Financial Technology Partners LP
FTP Securities LLC
is pleased to announce its exclusive role as
financial advisor to



in its sale to

GTCR



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Focused Exclusively on Financial Technology

Product Related Data / Analytics

Financial Technology Partners LP
FTP Securities LLC
is pleased to announce its exclusive role
as sole strategic and financial advisor to



in its strategic minority financing
from

accenture



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CRM / Strategic Pricing

Financial Technology Partners LP
FTP Securities LLC
is pleased to announce its role as
exclusive strategic and financial advisor to



in its Series B financing led by



for total consideration of

\$ 17,200,000



The Only Investment Bank
Focused Exclusively on Financial Technology

Online Bill Payment

Financial Technology Partners LP
FTP Securities LLC

is pleased to announce its exclusive role as
sole debt capital advisor to



in its acquisition of



for total consideration of approximately

\$ 300,000,000



The Only Investment Bank
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Open Banking Platform for Savings Deposits

Financial Technology Partners LP
FTP Securities LLC
is pleased to announce its exclusive role as
strategic and financial advisor to



in its minority investment in



with participation from
new and existing investors

for total consideration of

\$ 100,000,000



The Only Investment Bank
Focused Exclusively on Financial Technology

Credit Lifecycle Management

Financial Technology Partners LP
FTP Securities LLC
is pleased to announce its exclusive role as
sole strategic and financial advisor to



a portfolio company of



in its sale to



a portfolio company of



The Only Investment Bank
Focused Exclusively on Financial Technology

SaaS-based Loan Origination

Financial Technology Partners LP
FTP Securities LLC

is pleased to announce its exclusive role as
sole strategic and financial advisor to



in its sale to

Moody's



The Only Investment Bank
Focused Exclusively on Financial Technology

Deposit Automation

Financial Technology Partners LP
FTP Securities LLC

is pleased to announce its exclusive role as
sole strategic and financial advisor to



in its sale to



for approximately

\$ 42,500,000



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FT Partners Advises Marqeta on its Series E Financing

Overview of Transaction

- On May 21, 2019, Marqeta announced it has raised \$260 million in Series E financing led by Coatue Management
 - The round includes participation from several new investors including Vitruvian Partners, Spark Capital, Lone Pine Capital and Geodesic
- Founded in 2010, Marqeta is the leading global modern card issuer, powered by the most advanced issuer processor platform built in over two decades
- Marqeta's open APIs allow a new generation of businesses, such as Square, Affirm, DoorDash, Kabbage and Instacart, to build innovative payment programs and experiences to meet the unique needs of their customers

Significance of Transaction

- Marqeta, which has doubled its revenue for three straight years and experienced dramatic increases in spending activity on its platform, is now valued at nearly \$2 billion
- The funding will be used to accelerate Marqeta's expansion plans, both domestically and in key global markets
 - With 300 employees, the Company recently expanded internationally, opening a European office headquartered in London

FT Partners' Role

- FT Partners served as exclusive strategic and financial advisor to Marqeta and its board of directors
- FT Partners previously advised Marqeta on its [\\$45 million financing led by ICONIQ](#) in 2018, its [strategic \\$25 million financing led by Visa](#) in 2017, and its [\\$25 million Series C financing](#) in 2015 -- over this time period, Marqeta's valuation has grown over 20x
- This transaction demonstrates the long-term nature of many of FT Partners' client relationships and highlights our deep domain expertise and transactional excellence across FinTech and the Payments sector

Financial Technology Partners LP FTP Securities LLC

*is pleased to announce its role as
exclusive strategic and financial advisor to*



in its Series E financing led by

COATUE

with participation from new investors



for total consideration of

\$260,000,000



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FT Partners Advises Vitruvian on its Investment in Deposit Solutions

Overview of Transaction

- On August 15, 2018, Vitruvian Partners (“Vitruvian”) announced it has made a \$100 million minority investment in Deposit Solutions with participation from Kinnevik and existing shareholders including e.ventures
 - The investment values Deposit Solutions in excess of \$500 million
- Vitruvian is an independent European private equity firm that invests in high growth companies in Europe and beyond (more details [here](#))
- Headquartered in Hamburg, Germany, Deposit Solutions provides an international Open Banking platform for savings deposits
- Deposit Solutions’ Open Banking platform transforms the value chain in the savings deposit market to the benefit of banks and savers alike
 - Deposit Solutions now connects more than 70 banks from 16 countries to more than 30 million savers through a wide variety of Points-of-Sale including renowned financial institutions such as Deutsche Bank and Fidelity’s FFB

Significance of Transaction

- Through this investment, Deposit Solutions plans to accelerate the expansion of its business, while ultimately trying to achieve its mission of making Open Banking the new standard for the global \$50 trillion market for savings deposits

FT Partners’ Role

- FT Partners served as exclusive strategic and financial advisor to Vitruvian
- This transaction underscores FT Partners' deep FinTech expertise and its continued success in providing buy side advisory to top-tier financial sponsors

Financial Technology Partners LP FTP Securities LLC

*is pleased to announce its exclusive role as
strategic and financial advisor to*



VITRUVIAN
PARTNERS

on its minority investment in



**DEPOSIT
SOLUTIONS**

*with participation from
new and existing investors*

for total consideration of

\$100,000,000



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FT Partners Advises Zafin on its Series B Financing

Overview of Transaction

- On January 23, 2019, Zafin announced it has raised \$17.2 million in Series B financing led by Vistara Capital Partners, Beedie Capital and Accenture Ventures
- Headquartered in Toronto, Zafin is a global leader in financial services software that drives relationship pricing, bundling and rates management strategies for global financial institutions
 - The Company's technology platform is designed to modernize and augment legacy IT infrastructures that underpin the financial services industry
 - Its solutions enable banks to increase revenue generation, drive customer transparency and aid in regulatory compliance, ultimately enhancing the customer experience

Significance of Transaction

- The new funding will be used to expand sales and marketing growth along with continued product innovation
- Following its strategic alliance with Accenture in December 2018, the two companies will continue to work together in the fields of open banking, core transformation, AI and machine learning

FT Partners' Role

- FT Partners served as exclusive strategic and financial advisor to Zafin
- FT Partners recently advised Zafin on its strategic alliance with and sale of select professional services assets to Accenture
- This transaction underscores FT Partners' versatility and expertise across the FinTech universe and highlights its position as the "Advisor of Choice" to leading FinTech companies

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exclusive strategic and financial advisor to*



in its Series B Financing led by



for total consideration of

\$17,200,000



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FT Partners Advises Nomis on its Minority Financing

Overview of Transaction

- On May 23, 2017, Nomis Solutions Inc. ("Nomis" or the "Company") announced a minority financing round and strategic alliance with Accenture
- Headquartered in San Bruno, California, Nomis is a leading provider of analytics-driven pricing and profitability-management solutions to retail banks
 - Nomis provides cutting-edge solutions to support big data, advanced modeling and analytics, optimizing nearly \$1 trillion in banking transactions annually
- Accenture is a leading global professional services company providing a range of strategy, consulting, digital, technology and operations services and solutions across the globe
 - Accenture's core banking services help banks enhance, upgrade and transform their products, services and processes for efficiency and growth

Significance of Transaction

- The investment by Accenture enhances Nomis' ability to pursue its global growth strategy
- Under the alliance agreement, Accenture will be the preferred systems integrator for Nomis' profitability-management solutions, extending Accenture's capabilities in analytics pricing and providing Nomis with access to Accenture's financial services expertise and global scale

FT Partners' Role

- FT Partners served as exclusive strategic and financial advisor to Nomis in this transaction
- This transaction demonstrates FT Partners' continued success advising leading FinTech companies and generating highly successful outcomes in the Banking Technology space

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*is pleased to announce its exclusive role as
sole strategic and financial advisor to*



in its strategic minority financing from



*The Only Investment Bank
Focused Exclusively on Financial Technology*

Award-Winning Investment Banking Franchise Focused on Superior Client Results



2018 Top Investment Bank in FinTech



Institutional Investor
Annual Ranking

2018 Steve McLaughlin Ranked #1 for the Second Year in a Row on Institutional Investor's FinTech 40 List

2017 Ranked #1 on Institutional Investor's FinTech 40 List

2015 & 2016 Ranked Top 5 on Institutional Investor's FinTech 35 List

2006 – 2008 Consecutively Ranked (2006, 2007 and 2008) among the Top Bankers on Institutional Investor's "Online Finance 40"



The Information

2016 Ranked #2 Top Technology Investment Banker on The Information's "Silicon Valley's Most Popular Dealmakers"



M&A Advisor
Awards

2018 Corporate / Strategic Deal of the Year

2018 Cross Border Deal of the Year

2017 Investment Banker of the Year

2016 Investment Banking Firm of the Year

2016 Cross Border Deal of the Year

2015 Dealmaker of the Year

2015 Technology Deal of the Year

2014 Equity Financing Deal of the Year

2014 Professional Services Deal of the Year, \$100 mm+

2012 Dealmaker of the Year

2012 Professional Services Deal of the Year, \$100 mm+

2011 Boutique Investment Bank of the Year

2011 Deal of the Decade

2010 Upper Middle Market Deal of the Year, \$500 mm+

2010 IT Services Deal of the Year, Below \$500 mm

2010 Cross-Border Deal of the Year, Below \$500 mm

2007 Dealmaker of the Year – Steve McLaughlin

2007 Business to Business Services Deal of the Year

2007 Computer & Information Tech Deal of the Year, \$100 mm+

2007 Financial Services Deal of the Year, \$100 mm+

2004 Investment Bank of the Year

The FT Partners Senior Banker Team

Name / Position	Prior Background	Experience / Education	Years of Experience
Steve McLaughlin <i>Founder, CEO and Managing Partner</i>		<ul style="list-style-type: none"> Formerly with Goldman Sachs in New York and San Francisco from 1995-2002 Former Co-Head of Goldman Sachs' Financial Technology Group (#1 market share) Wharton M.B.A. 	24
Mohit Agnihotri <i>Managing Director</i>	J.P.Morgan	<ul style="list-style-type: none"> Formerly Managing Director and Global Head of Payments Investment Banking at J.P. Morgan Wharton M.B.A. 	17
Kate Crespo <i>Managing Director</i>	RAYMOND JAMES®	<ul style="list-style-type: none"> Formerly with Raymond James' Technology & Services investment banking 12+ years of FinTech transaction execution experience Dartmouth M.B.A. 	17
Larry Furlong <i>Managing Director</i>		<ul style="list-style-type: none"> Formerly with Goldman Sachs in New York, London and Los Angeles from 1995-2004 Wharton M.B.A. 	23
Osman Khan <i>Managing Director</i>		<ul style="list-style-type: none"> Formerly Managing Director and Head of FIG M&A at Alvarez & Marsal 15+ years FIG deal, consulting and assurance experience at PwC 40 Under 40 M&A Advisor Award Winner in 2013 	22
Andrew McLaughlin <i>Managing Director</i>	Deloitte.	<ul style="list-style-type: none"> 20+ years experience executing / implementing financial and operational strategy Formerly with Deloitte Consulting 	13
Mike Nelson <i>Managing Director</i>		<ul style="list-style-type: none"> Formerly head of FinTech M&A at SunTrust Robinson Humphrey Kellogg M.B.A. 	19
Timm Schipporeit <i>Managing Director</i>		<ul style="list-style-type: none"> Formerly with Morgan Stanley as Senior Executive Director of European Technology Investment Banking Team in London Formerly a Venture and Growth Investor focused on FinTech at Index Ventures 	16
Greg Smith <i>Managing Director</i>		<ul style="list-style-type: none"> Formerly award winning Equity Research Analyst at Merrill Lynch, J.P. Morgan and Hambrecht & Quist 20+ years of experience covering FinTech as both an Analyst and Investment Banker 	23
Tim Wolfe <i>Managing Director</i>		<ul style="list-style-type: none"> Formerly with Goldman Sachs from 2000-2002 40 Under 40 M&A Advisor Award Winner 2013 Harvard M.B.A. 	17