

Helping families pass on what *matters most.*

Meet CAFE founders Lori and David Selsberg, who help families organize, understand and protect what matters when it matters.



Lori Selsberg & David Selsberg
Co-Founders, CEO & COO, DocuGuardian

SWIPE →

BUILDING THE CATEGORY OF LIFE PREPAREDNESS

Built from a moment every *family fears.*

Lori Selsberg, JD and **David Selsberg** built DocuGuardian after a parent was unexpectedly intubated. The right documents existed, but accessing them in that moment was neither simple nor immediate. Their answer: a secure platform that keeps critical information available when it is needed, not when it is too late.

Lori is an attorney with deep experience inside **Fortune 100 regulated businesses**. David is a serial entrepreneur with **three startup exits** and a **patented OCR system**. With **LegacyIQ**, their upcoming AI intelligence layer, they aim to establish organized continuity and life preparedness as a recognized category, with DocuGuardian as its trusted infrastructure layer.

Attorney led

SOC 2 expertise

Spring 2026 Cohort



*This isn't about planning for **death.***

*It's about **caring** for the people you love and ensuring their legacy lives on long after they are gone.*

— **Lori Selsberg, JD** · Co-Founder & CEO, DocuGuardian

Prepared families, *stronger* community FIs.

THE OPPORTUNITY

\$84T wealth transfer

Is accelerating, and about 70% of heirs change financial relationships after inheritance. FIs that help families prepare keep the next generation, with expansion revenue potential from nominal fees.

THE STAKES

60+ hours of chaos

What the average family spends searching for wills, accounts, and final wishes after a crisis, exactly when they are least equipped to handle it.

DIRECT CRA ALIGNMENT

When families can easily find and understand their financial, legal, insurance, and healthcare information, they are **better equipped to navigate crises, preserve wealth, and achieve long-term financial stability.**

30 fintechs. One *scaling* network.

Through CAFE, DocuGuardian is connecting with community banks, credit unions, investors, and industry leaders accelerating their path to bringing document confidence to FIs serving LMI communities.

CAFE PARTNERS

ABA American Bankers Association

AFC American Fintech Council

WSFS CARES Foundation

SBDC Small Business Development Center

M&T M&T Bank

CRB Foundation @ Cross River

Help CAFE scale the next cohort.

Every dollar fuels founders building financial equity for LMI communities. CAFE supported activity qualifies for CRA community development consideration.

