The co-pilot for *financial confidence.*

Meet CAFE founder Jennifer Lewis, who is closing the wealth gap with conversational AI designed specifically for community-based financial organizations, deepening client engagement and closing systemic opportunity gaps for LMI communities.

JL

Jennifer Lewis

Founder & CEO, Valusync

A GAP SHE LIVED THROUGH, NOT JUST STUDIED

Built by someone who *lived the gap.*

Jennifer Lewis grew up in an LMI family. She watched her own community walk into the bank and walk out with no real plan, no guidance, and no one in their corner, not because they didn't want help, but because help was never built for them.

So she taught herself to code and built Valusync's first prototype herself, then earned her master's in public policy at the University of Chicago's Harris School, anchoring her approach in systemic, data-driven solutions. What started as a gap she lived through is now a toolkit helping community-based financial organizations show up for the clients who need them most.

- Patented inventor
- Harris School, UChicago
- Personal mission
- MassChallenge Fintech alum
- Blue Ridge Labs Fellow
- CAFE alum

One conversation. Three *outcomes.*

Valusync is a conversational AI toolkit built for community-based financial organizations. It targets economic inequality by helping FIs scale trustworthy guidance, turning everyday questions into **a personalized plan, matched products, and pre-filled applications.**

01

GUIDED PLANNING

Conversational AI

Clients talk through real goals, like buying a home or paying for college, and get a personalized financial plan in plain language.

02

SMART MATCHING

Product matchmaker

Surfaces financial products aligned to each client's plan, so frontline teams recommend with context, not guesswork.

03

SEAMLESS HANDOFF

Auto-filled applications

Uses the plan's own data to pre-populate applications, delivered as PDF, CSV, or direct to KYC and core systems.

PILOT SNAPSHOT · 90-DAY CREDIT UNION PILOT

92%	25%	75%	3.8/5
Completion rate	2nd/3rd product uptake	Drop in cost per funded account	Frontline usefulness score

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Economic mobility grows when people have **someone in their corner.** *Valusync helps institutions become that someone.*

— **Jennifer Lewis** · *Founder & CEO, Valusync*

Financial confidence, within *reach.*

Millions of LMI households are locked out of meaningful financial guidance. By turning conversations into plans, product matches, and paperwork, Valusync helps community-based financial organizations close opportunity gaps and bridge the wealth gap for the clients who need it most.

RACIAL WEALTH GAP

~6x

the median wealth gap between white and Black households in the US (Federal Reserve, Survey of Consumer Finances).

PILOT RESULTS

75%

drop in cost per funded account during Valusync's 90-day credit union pilot, matched via MassChallenge Fintech.

DIRECT SHARE-OF-WALLET ALIGNMENT

Helps community FIs get **upstream of the client relationship**, deepening trust and share of wallet while closing systemic opportunity gaps and meeting CRA community development goals for LMI clients.

45 fintechs. One *scaling* network.

Through CAFE, Valusync is connecting with community banks, credit unions, and industry leaders accelerating financial health and social mobility for LMI communities.

CAFE PARTNERS

ABA	American Bankers Association
AFC	American Fintech Council
WSFS	CARES Foundation
SBDC	Small Business Dev. 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.

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