

# Executive Summary

The Privacy-First Personal AI Studio

Date: August 27, 2025 Investment Ask: £300k pre-seed (10% equity)

## Company in One Sentence

Atlantis is the first personal AI assistant that runs on **Your Device**, analyses **Your Life's Data**, and integrates with **Your Life** — delivering insights and actionable intelligence **No Other AI** can legally or technically provide.

## The Problem - Would you give your diary to a stranger?

That's exactly what **more than 1B people\*** do with AI every day.

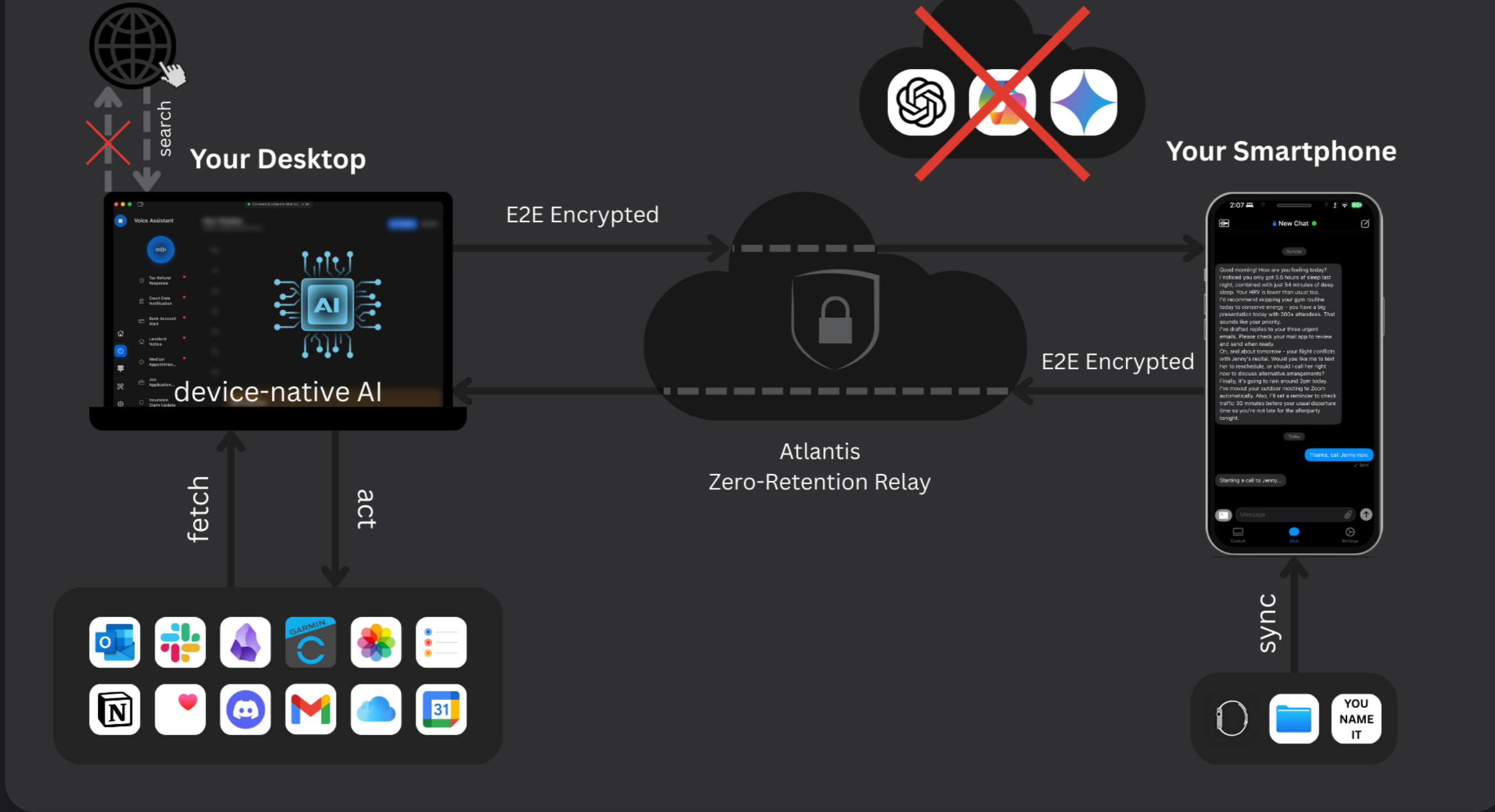
**5.5B**  
records breached in 2024 alone

**€5.88B**  
in GDPR fines

**Heavily regulated/restricted**  
in EU & China

**73%**  
more concerned about data privacy than ever

## The Solution - Private Device-Native AI Assistant



- Local-First Architecture
- Universal Data Integration
- Zero-knowledge architecture
- Workflows/Agentic Toolchains

## Proven Traction & Product-Market Fit

Product-Market Fit Evidence:

- 4.5/5** Closest Competitor Rating (Martin AI)
- 12.6B** Conversational AI Market
- £288M/£1.24B/£3.87B** Conservative/Base/Optimistic TAM

- Industry Trends**
  - Y Combinator:** 40% of S24 batch is AI startups (vs 8% in 2020)
  - Privacy Demand:** 75% consumers WILL NOT purchase from organizations they don't trust with their data
  - Regulatory Tailwind:** EU AI Act enforcement begins August 2025
- Similar Valuations**
  - Perplexity:** \$3B (AI search)
  - Rewind.ai:** \$350M (personal recording)
  - Tab AI:** \$100M (privacy assistant)
  - Personal.ai:** \$8M seed (AI memory)

## Business Model & Unit Economics

Projected Unit Economics

- £42** CAC
- £126** LTV
- 3:1** LTV:CAC Ratio
- 70%** Gross Margin
- £0** Compute spend

- 1. SaaS Subscriptions (B2C)**  
Free (1 device) → Pro (£15.99/mo) → Family (£29.99/mo)  
**Target:** 15% conversion (vs 2.5% industry average)
- 2. Enterprise (B2B)**  
Team (£99/user/mo) → Enterprise (£199/user/mo)  
**Key Value:** Only privacy-compliant AI for sensitive data
- 3. Platform Revenue (B2D)**  
30% marketplace commission  
**Network Effects:** More users → more developers → more plugins

## Team & Use of Funds

- Ivan Pavlov, Co-Founder & CEO**  
Operator with 10+ yrs in engineering leadership, product delivery, and team scaling. Proven track record of building subscription-driven platforms and launching digital products used by millions.
- Dan Pavlov, Co-Founder, Technical Advisor**  
**Senior Backend Engineer, Fingerprint**  
Deep expertise in scalable distributed systems and AI infrastructure from Fingerprint and Unity (game server hosting for millions of users).

Immediate Hires: CTO (£65k), Growth Lead (£48k), Software Engineer (£45k)

Use of Funds (£300k / 12 months):

- 68%** Personnel (£203.7k)
- 10%** Marketing (£31.5k)
- 8%** Infrastructure (£24.6k)
- 14%** Contracted Work & Buffer (£40.2k)

## Why Invest Now? The Opportunity

- Series A Milestone**  
**£432k+**  
ARR target in 18 months for £2.1M-£4.3M Series A  
Now → 18 months  
£0 MRR → £36k MRR
- Financial Projections**  
**£36k+** MRR at 18mo(Base) | **2.25k+** Paying Users(Base)  
3:1 LTV:CAC | 70% Gross Margin (COGS = VAT + marketplace fees only)
- Market Size & Validation**  
**£3.3B** Privacy-enhanced AI market | **£1.24B** Base Case TAM  
**\$2M** Closest Competitor (Martin AI) Seed | **75%** consumers WON'T trust their data
- Technical Advantage**  
**40-60%** Inference costs as % of revenue (vs 0% for Atlantis)
- Clear Path to Scale**  
Pre-Seed (Now) → 6 Months → Seed (12 Months) → 18 Months → Series A  
3 month headstart Apps available for beta | MVP Release 1k users, £2.4k MRR | £12k MRR, 5k users £1.2M-£1.5M seed valuation | Series A Ready £36k+ MRR, 15k users | £2.1M-£4.3M Valuation £432k+ ARR

## The Bottom Line

While ChatGPT harvests data from 700M weekly users and Apple Intelligence faces EU regulatory blocks, we've built the architecture Big Tech can't: local-first AI that runs on YOUR hardware, analyzes YOUR data, and never leaves YOUR device ecosystem.

**The Ask: £300k for 10% equity. 12 months to £144k ARR, then £1.2-1.5M seed round.**

- Ready to Discuss?** [ivan@atlantisai.cc](mailto:ivan@atlantisai.cc) | +44 7546 819318
- Want to learn more?** See the [full version](#)
- PDF Version** [Download](#)

\* All figures are supported by external data sources, research, and reports, and can be reviewed in detail in the full Pitch Deck.