

YUY AI – VC Pitch Deck

Professional AI You Own + Coherence Monitoring

- THE PROBLEM & OPPORTUNITY

-- \$7T+ Professional Services Market Paying Double

The Pain:

- Lawyers/Analysts spend \$10K-20K/year on AI (Harvey, CoCounsel)
- \$100K-150K+ per user over 10 years (infinite subscriptions)
- Cloud-only (GDPR risk, breach liability)
- Recent major outages: Harvey down 4+ hours (Nov 2025), OpenAI outages, Azure disruptions = lost billable hours
- Quality degrades silently (no coherence monitoring)
- Solos & small firms (60% of market) = ignored

The Opportunity:

- Legal: \$1.1T+ global, 500K+ solo/small firms in US underserved
- Finance: \$300B+ advisory/compliance, independent analysts
- Medical: \$100B+ clinical support (phase 3)

Addressable TAM: \$793M-3.25B+ (software + hardware + SaaS)

- THE SOLUTION: DUAL-PRODUCT

-- YUY: One-Time, Locally Owned + InsAlts: SaaS Monitoring

- - - YUY AI Workspace

- Software: \$4,995-29,995 one-time (vs \$100K+ over 10 years competitors)
- Hardware Bundles: \$6,995-14,995 (AMD Halo / Mac Mini + YUY pre-loaded)
- Features:
 - 100% local/offline (air-gap capable)
 - Works during cloud outages (zero downtime dependency)
 - 100GB compressed knowledge
 - Persistent memory (learns from your work)
 - Anti-hallucination (grounded citations, honest “I don’t know”)
 - InsAlts monitoring included free

- - - InsAlts SaaS (Datadog for AI)

- Standalone: \$49/ \$99-999/month (Pro/Team/Enterprise)
- Function: Detects AI-to-AI coherence degradation (6 anomaly types)
- Market: Multi-agent AI (\$5B → \$50B 2030), any LLM stack
- Bundled free in YUY , paid for external agents

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YUY (one-time) → Immediate cash flow

InsAlts (recurring) → 3-10x valuation multiplier

Hardware (one-time) → Adoption acceleration (tangible)

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- COMPETITIVE ADVANTAGE

- - 6 Things Competitors CANNOT Copy

Feature	Harvey&others	Yuy
10-year cost	\$100K-500K/user	\$5K-30K one-time
Deployment	Cloud-only	Local + offline
Uptime	Cloud outages (4+ hrs)	Works offline 24/7
Memory	Zero between sessions	Learns continuously
Monitoring	None	InsAlts built-in
Ownership	Rental	You own .aiz files
Privacy	Breach risk	Data never leaves device

Why They Can't Copy:

- Business model cloud-locked (recurring = their valuation)
- Pivot to local destroys subscription revenue
- InsAlts = proprietary tech (embeddings + 6 detectors)
- First-mover: 6-8 months before they notice, 6 months to rebuild

- BUSINESS MODEL

-- Triple Revenue Streams

--- YUY Software (One-Time)

Tier	Price	Target
Solo	\$4995	Individual practitioners
Team	\$9995	Firms 2-10
Enterprise	\$29995	Firms 10-50

--- YUY Hardware (One-Time)

Product	Price
AMD Box	\$6995
Aple Box	\$8995

- - - InsAlts SaaS (Recurring)

Tier	Price	Target
Free	\$0	Bundled in YUy
Starter	\$49	External agents
Pro	\$99	External agents
Enterprise	\$999	On prem

Unit Economics (Year 1 avg customer):

- CAC: \$1,500-2,000 (direct sales, content marketing)
 - LTV: \$20,000-50,000 (one-time + hardware upsell + InsAlts recurring)
 - Payback: <6 months
 - Gross Margin: 70-85% (software/SaaS), 40-50% (hardware bundles)
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- TRACTION & PROOF

- - What's Already Built

Technology (Working Today):

- 3.5M+ neurons (efficient architecture demo)
- InsAlts detection engine (6 anomaly types working)
- FAISS search (100x speedup vs naive)
- Anti-hallucination (grounded citations)
- Hierarchical reasoning (Core 15 wisdom neurons)

Honest Limitations:

- Current neurons = general demo (NOT vertical-specific yet)
- Laptop-limited (needs Rack for production)

- InsAlts cloud = needs AWS/GCP infrastructure
- Hardware bundles = needs prototype validation

Post-Funding Priorities:

1. Finance .aiz targeted pack (10GB, Q1-Q2)
 2. Rack deployment (multi-user production)
 3. InsAlts Pro cloud (AWS Lambda + DynamoDB)
 4. Hardware validation (AMD + Apple prototypes)
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- GO-TO-MARKET

-- Land & Expand – 12 Months

Phase 1 (Months 1-3): Foundation

- Open source core (GitHub community)
- Content marketing (SEO: “offline legal AI,” “air-gap compliance”)
- Hardware demos (video “unboxing to first query in 5 min”)

Phase 2 (Months 4-6): Beta Paid Pilots

- 50 YUY users (35 software @ \$500 discount, 15 hardware @ \$1K discount)
- 25 InsAlts Pro users (3-month free trial)
- Case studies (3-5 detailed testimonials)

Phase 3 (Months 7-9): Launch

- Direct sales (no middleman, 70% margins)
- Partnerships (bar associations, compliance orgs)
- Conferences (booth demos with YUY Box live)

Phase 4 (Months 10-12): Scale

- Cross-sell: YUY → InsAlts Pro, InsAlts → YUY
- Trade-in program (hardware upgrades)
- International (Germany, Switzerland entry points)

Month 12 Metrics:

- 130 total customers (100 software + 30 hardware)
 - 50 InsAlts Pro users
 - \$800K-1M revenue (proof for Series A)
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- THE TEAM

- - Built + Needs

Cristi (CEO/CTO) – Romania 

- Built: 3.5M neurons + InsAlts engine + hardware strategy
- Expertise: AI systems, RAG, local inference, coherence monitoring
- Track record: Solo-built triple-product architecture, compression tool 95-99.5% ratio, multi AI app Mindplex -live on Gumroad, detection tool for AI generated image-video

[COO/CMO] –  URGENT NEED

[VP Engineering] –  URGENT NEED

Equity Framework:

- Cristian : 55% (solo founder, tech built)
- VP Engineering 22.5% (revenue engine)

-COO: 22.5% (technical scale)

- Investor pool: 15-20%

- THE ASK

-- \$50K Seed → \$1M Revenue in 12 Months

--- Use of Funds

Item	Cost	Purpose
Dev Server (Rack)	\$20.000	Multi-user YUY production
Hardware Prototypes	\$8.000	2x AMD + 1x Apple
Cloud Credits (InsAlts)	\$3.000	Legal/finance APIs (public only)
Marketing MVP	\$14.000	Landing pages, demo videos
Legal	\$5.000	Patent, data audit
TOTAL	\$50.000	

--- Investor ROI

Seed (\$50K @ \$500K-1M pre-money):

- Equity: 5-10%

- Milestone: Triple-product MVP live (Month 6)

- Exit potential: \$25M-100M (5-10% × \$500M-1B exit)

- Return: 50-200x in 5-7 years

Series A Ready (Month 12-15):

- Traction: \$1M+ revenue, 200+ customers
 - Raise: \$3M-5M @ \$15M-25M valuation
 - Pro-rata rights for seed investors
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- TIMELINE

-- 12 Months to Proof

Milestone	Month	Deliverable
Team Complete	1	
Infrastructure	2	Rack + prototypes
Finance .aiz	3	40GB targeted pack ready
Beta Start	Yuy -4 months InsAlts 2 weeks	
Product Launch	Yuy – 6 months InsAlts 4 weeks	Public availability
First Revenue	6-8	\$300K proof (130 customers)
Series A Prep	12	\$800K-1M revenue, case studies

Truth: B2B cycles = 6-12 months (not 3-6). Hardware accelerates (tangibility = trust faster).
InsAlts SaaS conversion 10-15% realistic.

- WHY NOW

-- Perfect Storm

Market Timing:

- Cloud reliability crisis: Harvey 4+ hour outage (Nov 2025), OpenAI disruptions, Azure downtime = professionals losing billable hours
- Subscription fatigue (\$10K-50K/year revolt)
- GDPR fines \$billions (privacy = top concern)
- Users observe quality degradation (context collapse is real)
- Hardware trend (Mac Studio, AMD Halo = local AI acceptance)

Tech Timing:

- Llama 3.3, Qwen 2.5 = local models 70-80% GPT-4 quality
- AMD Halo (128GB, \$2,500) + Mac M4 Pro (64GB, \$2K) = mainstream
- FAISS, embeddings mature = coherence detection tractable

Competition Timing:

- Harvey, CoCounsel cloud-locked (can't pivot without destroying valuation)
- ZERO offer coherence monitoring (InsAlts = blue ocean)
- First-mover: 6-8 months before they notice, 2-3 years to rebuild

Window: 6-8 months to capture early adopters before competitors notice. After that, they'll see the trend—but 2-3 years to execute local pivot.

- RISKS & MITIGATION

Risk	Mitigation	Backup
Long sales cycle (12 months)	Beta paid pilots (quick proof), hardware tangibility	InsAlts SaaS cashflow during slow YUY
Data legal (scraping)	Public domain only (audited sources)	User-uploaded content, publisher partnerships
Team fit (remote 3-person)	3-month trial, clear roles, weekly syncs	Advisory board (fractional talent)
InsAlts adoption slow	Free bundled in YUY (guaranteed users)	Focus YUY revenue, InsAlts bonus

Hardware complexity	Pre-orders (zero inventory risk), white-label partners	Software-only pivot if no traction
Competitors copy	Patents, first-mover (6-8 months), network effects	White-label license (Thomson Reuters)

Diversification: Triple-product = if one lags, another compensates. Hardware accelerates software. InsAlts SaaS = recurring stability.

- EXIT STRATEGY

-- \$500M-1B in 5-7 Years

Scenario 1: IPO (Preferred)

- Dual-model (ownership + SaaS) = Datadog-style valuation
- Market cap potential: \$5B-10B (comparable to Datadog \$30B, Snowflake \$50B at peak)
- Timeline: 2030-2032 (post-Series B/C)

Scenario 2: Strategic Acquisition

- Thomson Reuters: \$500M-1B (add local AI to Westlaw/CLEAR)
- LexisNexis: \$300M-500M (compete with Thomson)
- Datadog: \$200M-400M (InsAlts standalone = observability play)
- Timeline: 2028-2030 (post-Series A traction)

Scenario 3: White-Label Pivot

- License tech to incumbents (if they beat us to market)
- Recurring revenue model (B2B SaaS licensing)
- Lower valuation (\$100M-300M) but faster exit

Investor Return (Seed \$50K @ 5-10%):

- IPO: \$250M-1B (5,000-20,000x)
 - Acquisition: \$25M-100M (500-2,000x)
 - White-label: \$5M-30M (100-600x)
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- EXECUTIVE SUMMARY

-- One-Slide Pitch

- > "Harvey AI raised \$100M+ to rent lawyers AI at \$10K-20K/year—without quality monitoring and with cloud outages costing billable hours.
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- > We're building AI they can OWN for \$5K-30K one-time—with built-in coherence protection (InsAlts) and 100% offline capability.
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- > PLUS plug-and-play hardware bundles (\$7K-15K).
- >
- > PLUS InsAlts standalone—'Datadog for AI' at \$99-999/month.
- >
- > Three revenue streams: software + hardware + SaaS.
- >
- > TAM: \$793M-3.25B+ (legal + finance + medical).
- >
- > Asking: \$50K seed for 6 months to triple-MVP.
- >
- > Exit: \$500M-1B in 5-7 years (IPO or acquisition).
- >
- > Timing: 6-8 month window before competitors notice. "

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”They rent. You own. We give you privacy.”

— YUY AI, January 2026