

# Beagle

## A Provider of Digital Solutions for Retirement Plan Rollovers

Tiburon Written Research  
December 16, 2025



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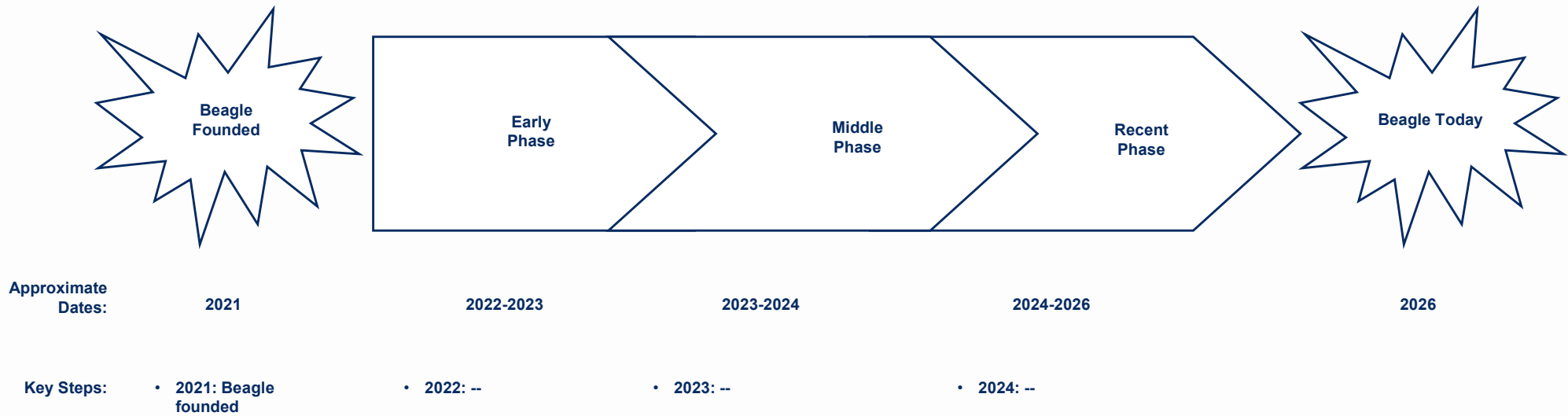


## Comments

- **Founded in 2021**
  - **Founded by Shuo Jiao & Cyrus Ghazanfar**
- **Based in Los Altos, CA**
- **1 office**
- **XX employees**
- **CEO: Shuo Jiao**
- **Privately owned**
- **Website: [www.meetbeagle.com](http://www.meetbeagle.com)**

# Beagle was Founded in 2021 and Has Subsequently Evolved through its Early, Middle, & Recent Phases

## Beagle History



# ***Beagle was Founded by Shuo Jiao & Cyrus Ghazanfar in 2021***

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## **Comments**

- **Founded in 2021**
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# Beagle Has Had Numerous Venture Capital Raises, Including its Seed Round in \_\_\_\_\_

## Beagle Venture Capital Raises

Seed Round	Series A	Series B	--
• --	• --	• --	• --  <b>Beagle</b>

# Beagle Has Won Many Awards...

## Beagle Awards & Recognition

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• --	• --	• --	• -- 

Source: Tiburon Research & Analysis

# Beagle is Not a Frequent Advertiser

Advertising

## Comments

- --

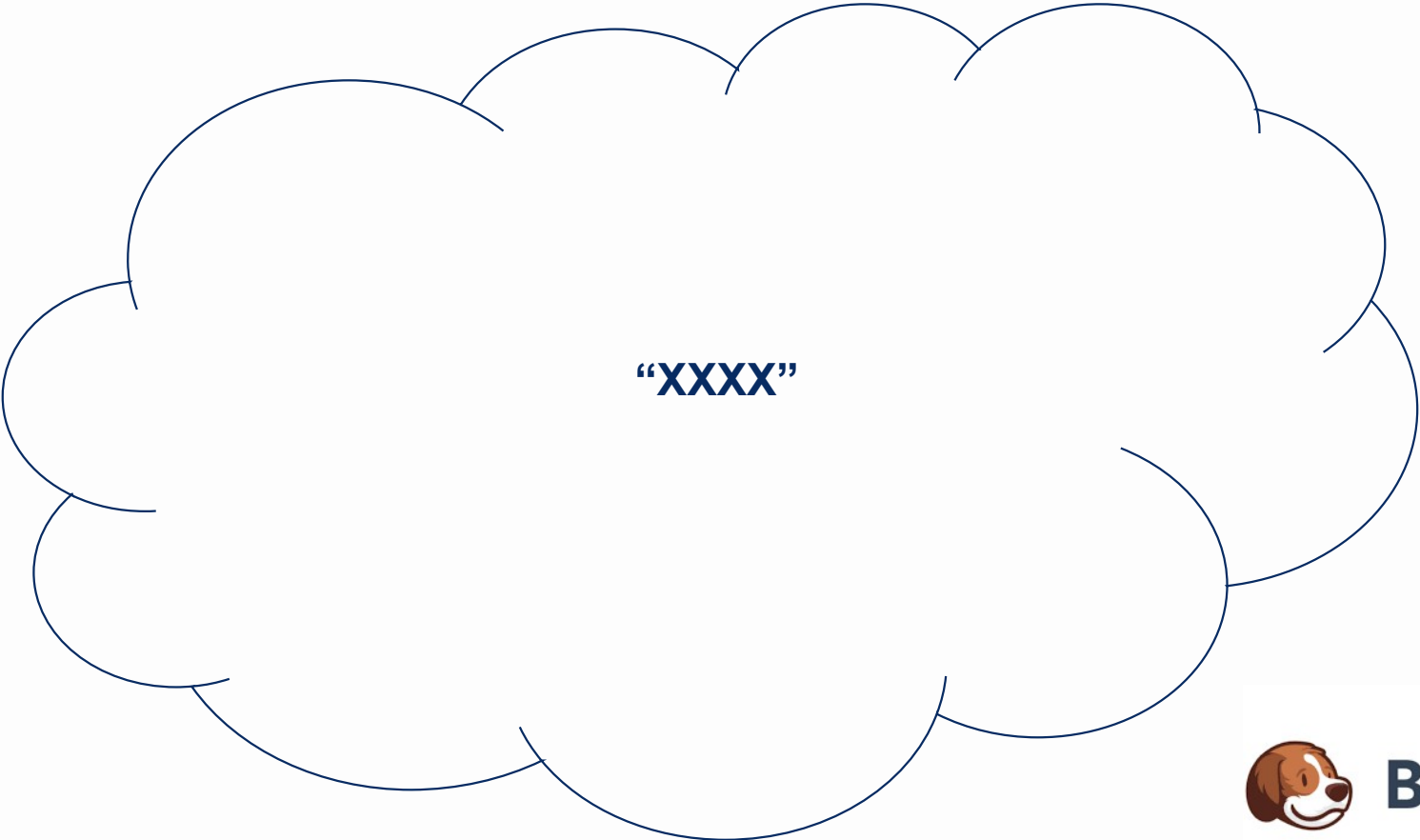


Source: Tiburon Research & Analysis

# Beagle Has a Mission Highlighting....

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## Beagle Quote



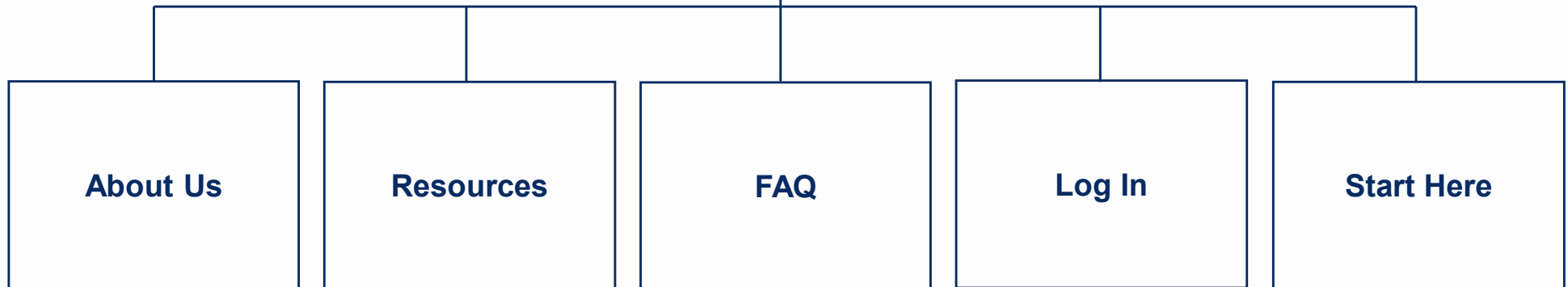
# ***Beagle Has a Website with Five Core Sections, Including About Us, Resources, FAQ, Log In, & Start Here***

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## **Beagle Website**



**Beagle Website**



*Source: 12/16/25 Beagle Website; 12/15/25 Beagle Website; Tiburon Research & Analysis*

# Beagle is Not a Frequent Acquirer

Acquisitions

## Comments

- 



Source: Tiburon Research & Analysis

# Beagle Has a Charitable Giving Program

Charitable Giving

## Comments

- 



Source: Tiburon Research & Analysis

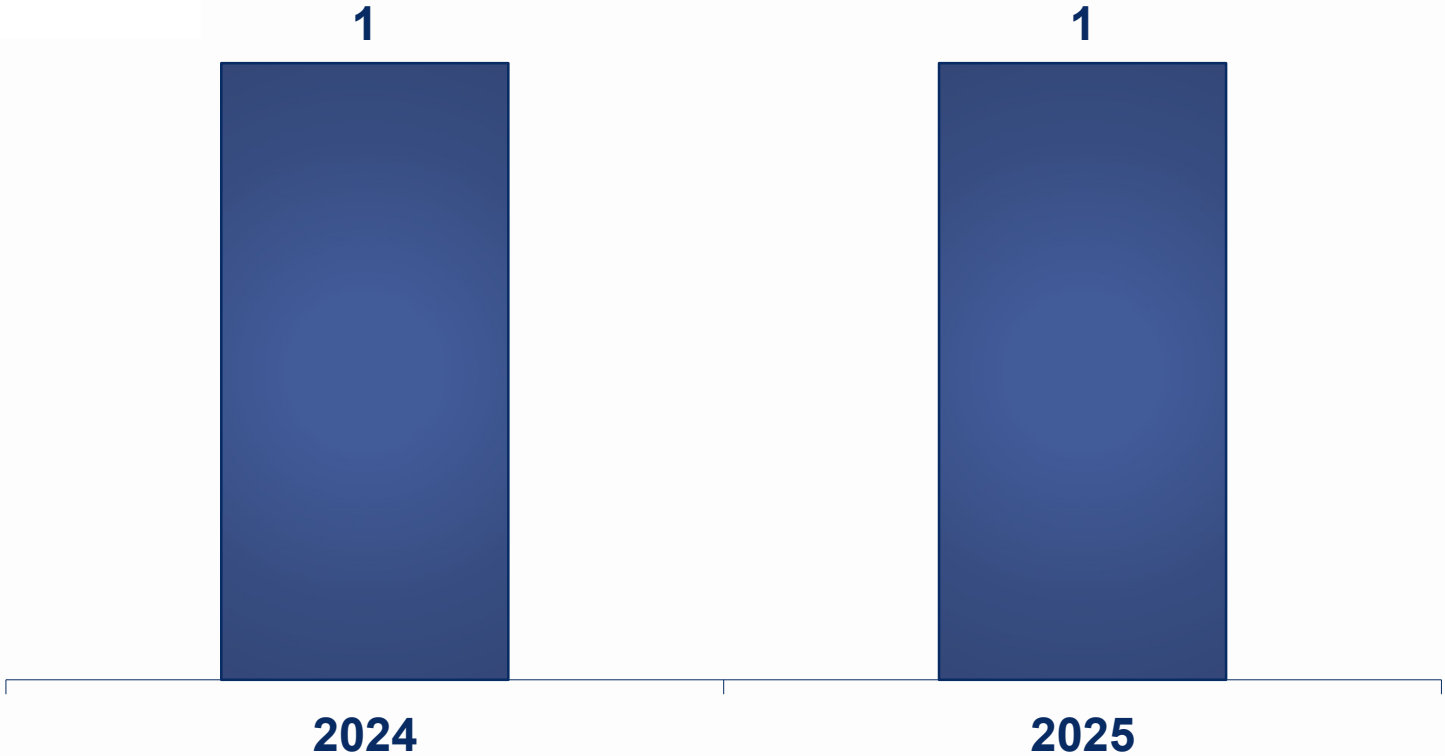
# Beagle Has One Office, Consistent Since 2024

Count of offices  
on next page: 1



**Beagle**

## Beagle Offices



Source: 12/15/25 LinkedIn Website; Tiburon Research & Analysis

# Beagle's Offices Include Los Altos, CA

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## Beagle Offices

- Los Altos, CA

- --

- --



# Beagle Has \_\_ Employees, Consistent Since 2024

Needs data

## Beagle Employees



Source: Tiburon Research & Analysis

# Beagle Serves Institutional Clients

## Beagle Institutional Clients

Needs data

Count of ICs on next page: X



2024 2025

Source: Tiburon Research & Analysis

# Beagle's Institutional Clients Include...

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## Beagle Institutional Clients

• --

• --

• --



Source: Tiburon Research & Analysis

# Beagle Generates Revenues

Needs data

## Beagle Revenues (\$ Millions)



2024 2025

Source: Tiburon Research & Analysis

# ***Beagle Earns Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA)***

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Needs data

## **Beagle Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA) (\$ Millions)**



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**2024** **2025**

Source: Tiburon Research & Analysis

# Beagle Earns \$\_\_\_ Million

Needs data

## Beagle Net Profits (\$ Millions)

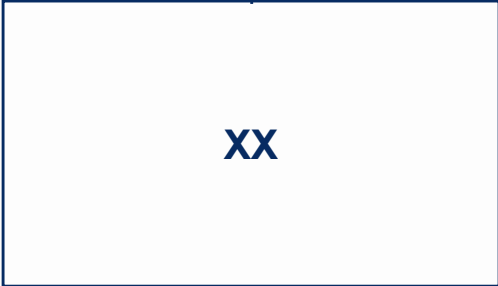


2024 2025

Source: Tiburon Research & Analysis

# Beagle Has a Number of Businesses, Including XX, XX, & XX

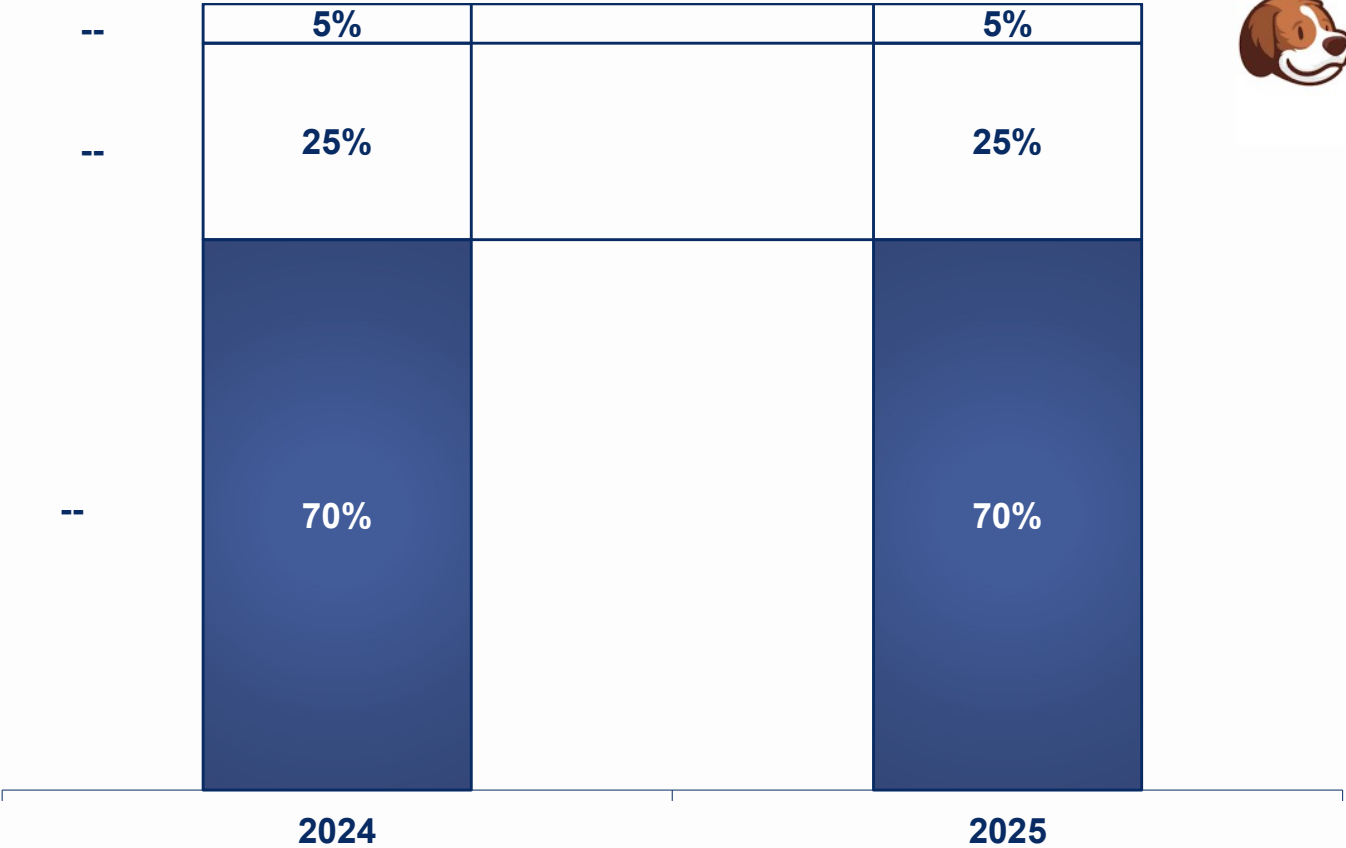
## Beagle Businesses



Source: Tiburon Research & Analysis

# Beagle Processes Rollovers Across its Businesses

## Beagle Rollovers By Business



**Beagle**

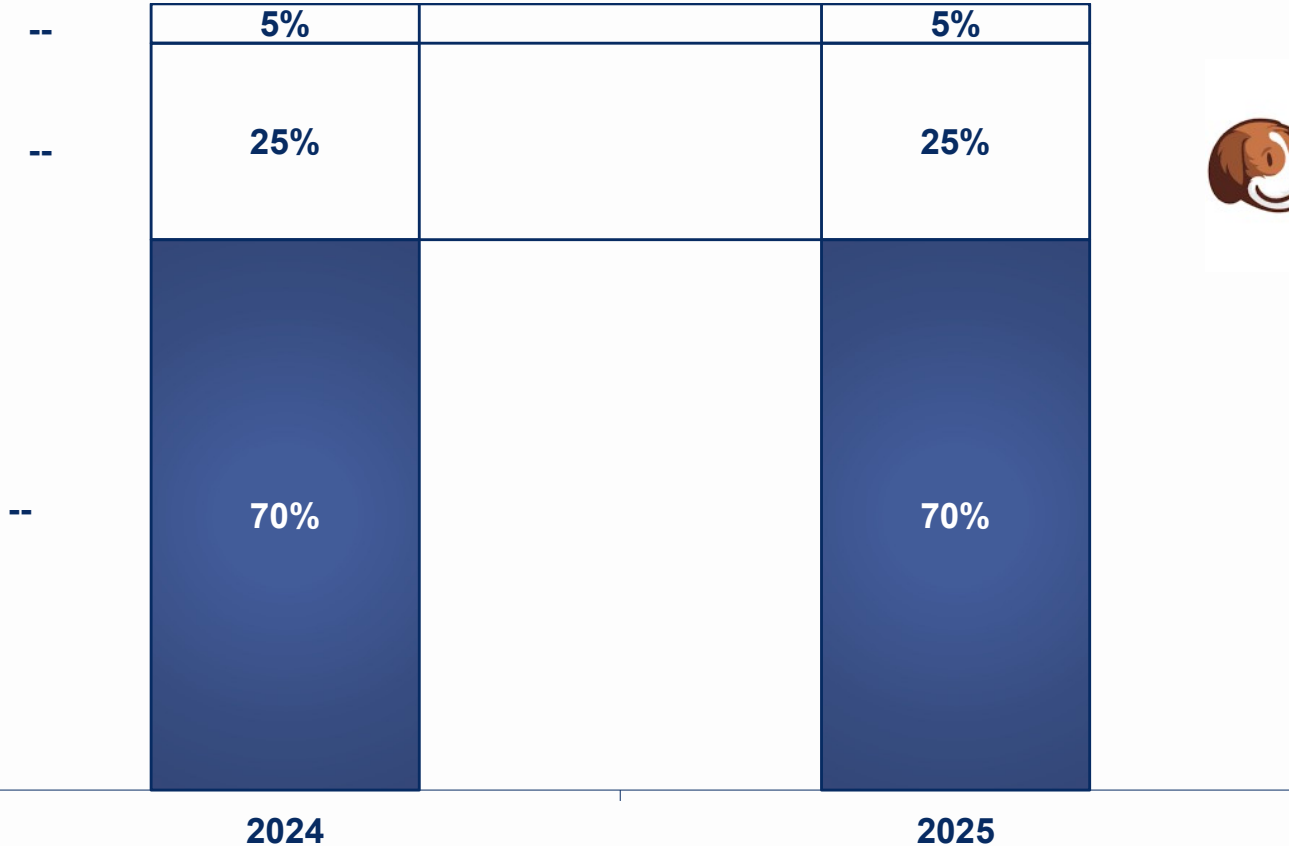
Needs data

Number of Rollovers

Source: Tiburon Research & Analysis

# Beagle Processes Rollovers Across its Businesses

## Beagle Rollovers By Business



Needs data

\$ Amount



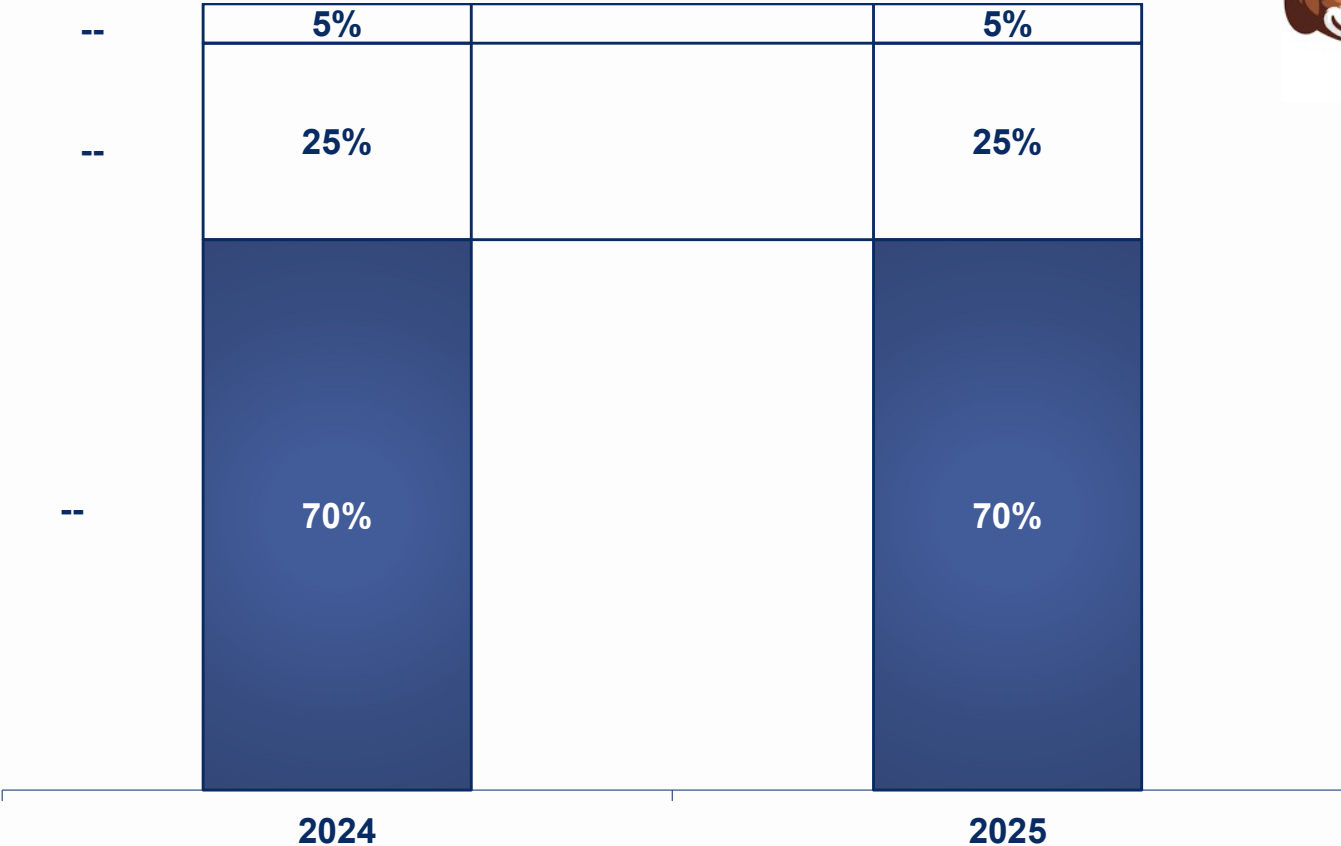
**Beagle**

Source: Tiburon Research & Analysis

# Beagle Generates Revenues Across its Businesses

Needs data

## Beagle Revenues By Business

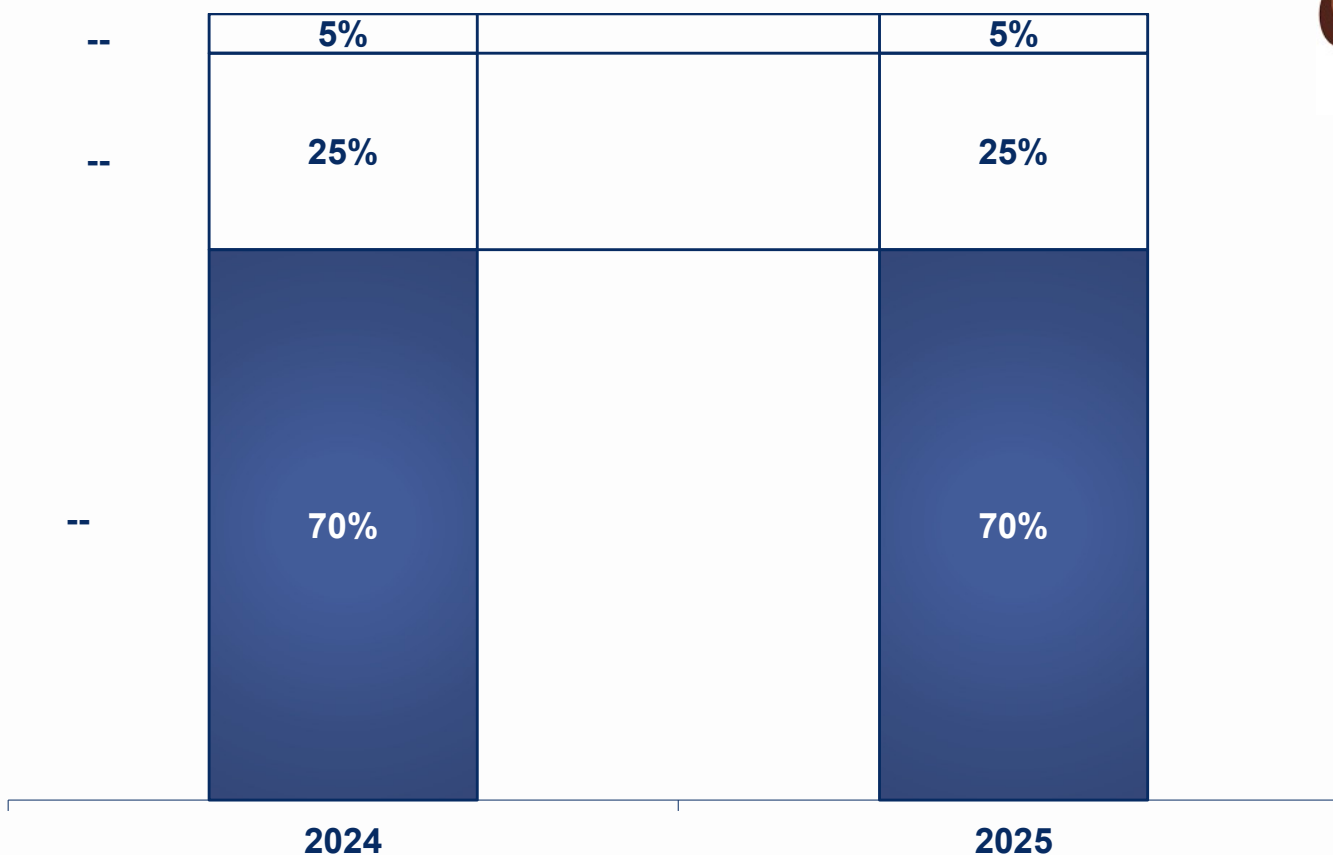


Source: Tiburon Research & Analysis

# Beagle Earns Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA) Across its Businesses

## Beagle Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA) By Business

Needs data



# Beagle's First Business is XX

xx

## Comments



- --

Source: Tiburon Research & Analysis

# Beagle's Second Business is XX

xx

## Comments



- --

# Beagle's Third Business is XX

xx

## Comments

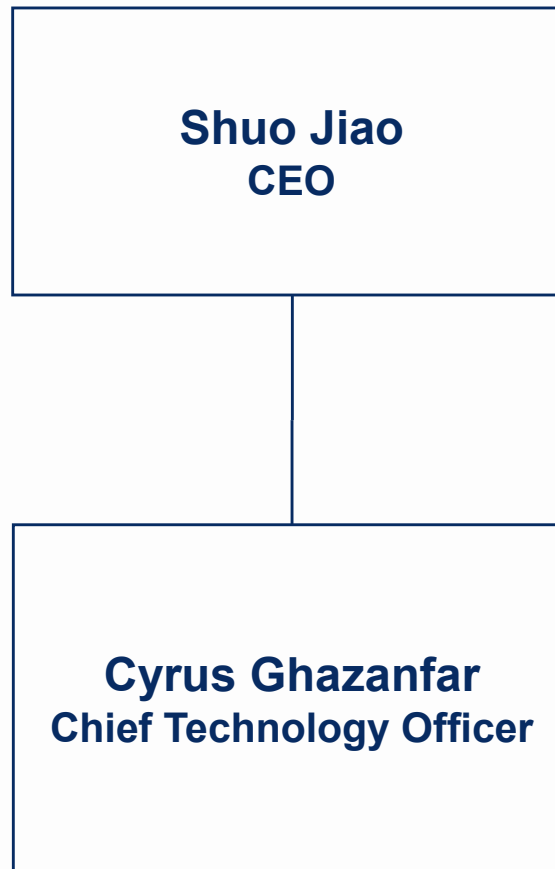


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# Beagle is Led by its CEO Shuo Jiao

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## Beagle Organizational Chart



*Shuo Jiao co-founded the firm in 2021; January.ai, Landing, Health IQ, Fred Hutchinson Cancer Research Center, & SAS; Cyrus Ghanazanfar co-founded the firm in 2021; he was formerly at Devpost, Foundation Center, Joinery Housing, Pilota, UNICEF France, & United Nations*  
*Source: 12/15/25 Beagle Website; Tiburon Research & Analysis*

# Beagle Has a Board of Directors that Includes XX, XX, & XX

## Beagle Board of Directors

-- (Chairman)	--	--	--	--
• --	• --	• --	• --	• -- 

Source: Tiburon Research & Analysis

# Beagle is Privately Owned

Beagle, Inc. CIK#: XXXXXXXXX

## Comments

- --



**Beagle**

# Beagle Has Assets

Needs data

**Beagle  
Assets  
(\$ Millions)**



2024 2025

Source: Tiburon Research & Analysis

# Beagle Has Liabilities

Needs data

## Beagle Liabilities (\$ Millions)



2024 2025

Source: Tiburon Research & Analysis

# Beagle Has Shareholders Equity

Needs data

## Beagle Shareholders Equity (\$ Millions)



2024 2025

Source: Tiburon Research & Analysis

# Beagle Earns... Per Share

Needs data

## Beagle Earnings Per Share



2024 2025

Source: Tiburon Research & Analysis

# Beagle Declares... Dividends Per Share

Needs data

## Beagle Dividends Per Share



2024 2025

Source: Tiburon Research & Analysis

# Beagle Has a... Dividend Yield

Needs data

## Beagle Dividend Yield



Source: Tiburon Research & Analysis

# Beagle's Stock Price is...

Needs data

## Beagle Stock Price



2024 2025

Source: Tiburon Research & Analysis

# Beagle Has... Shares Outstanding

Needs data

## Beagle Shares Outstanding



Source: Tiburon Research & Analysis

# Beagle's Market Capitalization is...

Needs data

## Beagle Market Capitalization (\$ Millions)



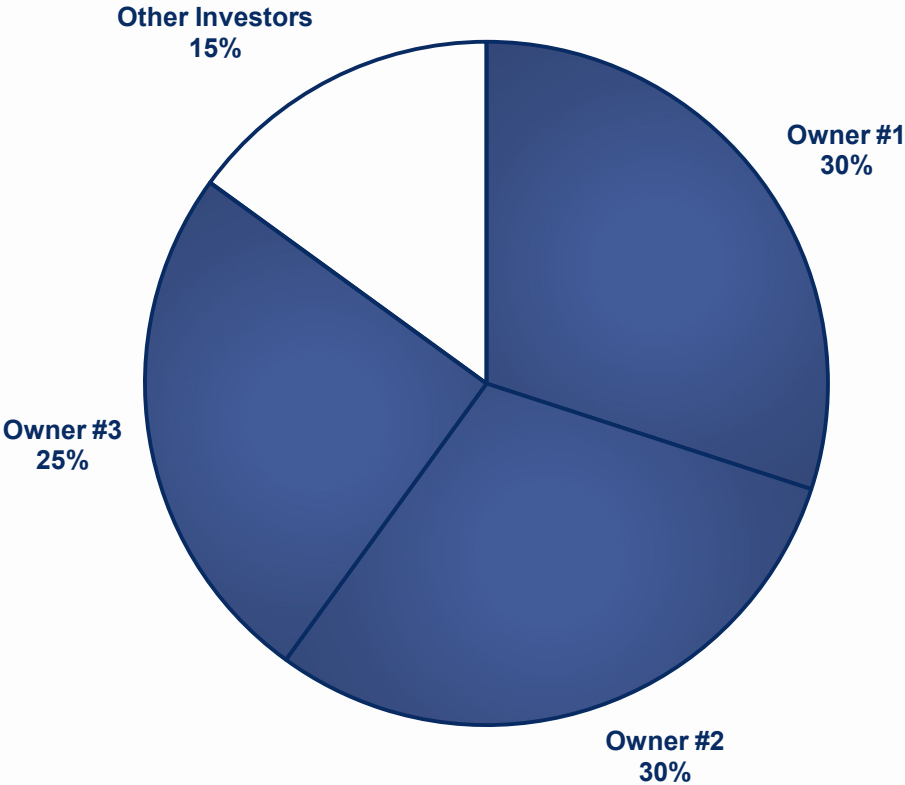
2024 2025

Source: Tiburon Research & Analysis

# Beagle is Owned by XX, XX, XX, & Other Investors

Needs data

## Beagle Ownership By Owner



Source: Tiburon Research & Analysis

# Beagle's Stock Volume is...

Needs data

## Beagle Stock Volume



Source: Tiburon Research & Analysis



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