

Zocks Communications

An Artificial Intelligence (AI)- Powered Assistant for Wealth Management Firms

Tiburon Written Research
July 13, 2026



TIBURON STRATEGIC ADVISORS

Industry Leading Think Tank, Advisor, and Investor in
Wealth & Investment Management (& WealthTech) Firms



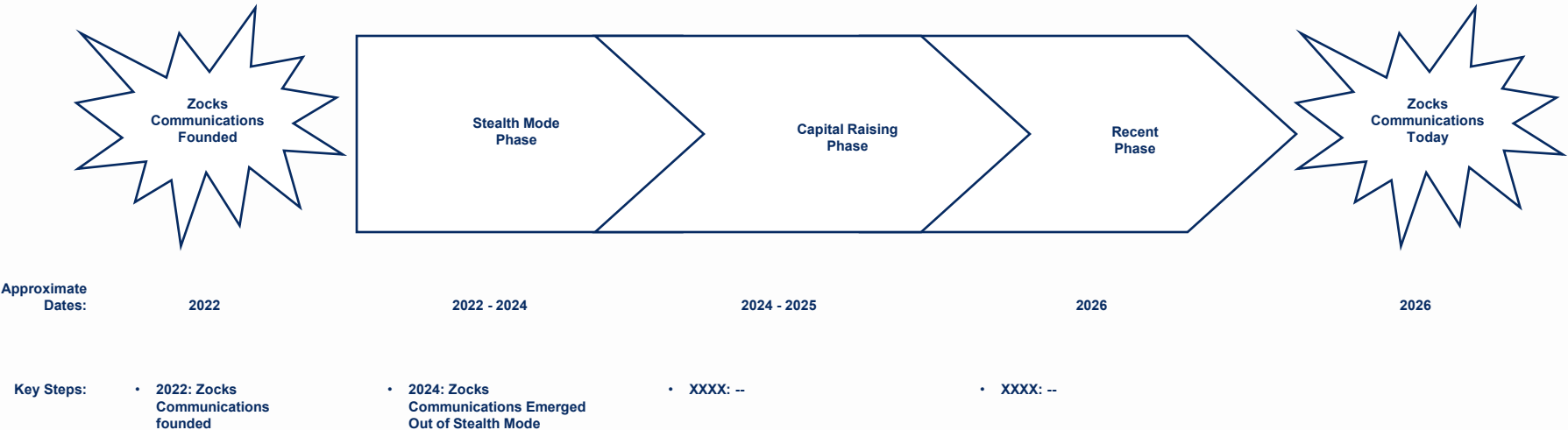
Comments

- **Founded in 2022**
 - **Founded by Mark Gilbert & Akos Ratku**
- **Based in San Francisco, CA**
- **2 offices**
- **158 employees**
- **XX institutional clients**
- **CEO: Mark Gilbert**
- **Privately owned**
- **Website: www.zocks.io**

Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communications was Founded in 2022 and Has Subsequently Evolved through its Stealth Mode, Capital Raising, & Recent Phases

**Zocks Communications
History**



Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communications was Founded by Mark Gilbert & Akos Ratku in 2022



Comments

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Zocks Communications Emerged Out of Stealth Mode in 2024



Comments
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Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communications Venture Capital Raises

Pre-Seed Round	Seed Round	Series A	Series B
-- Z zocks	--	--	--

Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communications Has Won Many Awards...

Zocks Communications Awards & Recognition

--	--	--	--
--	--	--	-- 

Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communications is Not a Frequent Advertiser



Advertising

Comments

-

Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

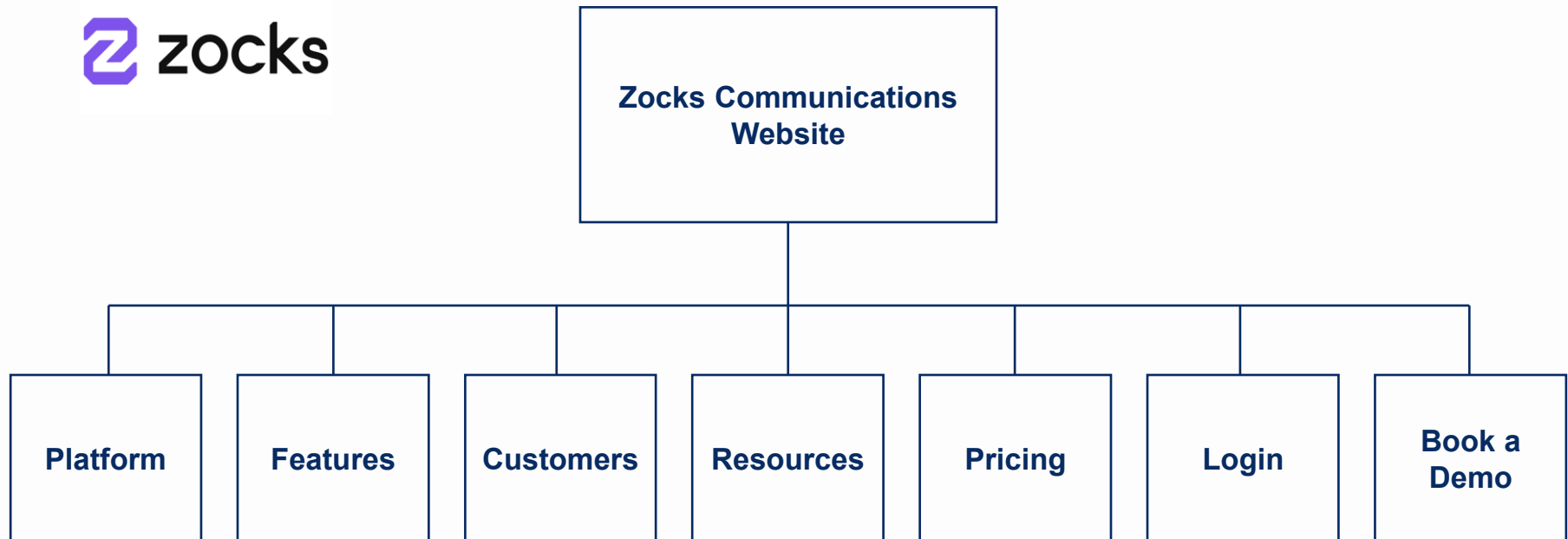
Zocks Communications Quote

**“Get ten + hours a week back to focus on
your clients”**



Zocks Communications Has a Website with Seven Core Sections, Including Platform, Features, Customers, Resources, Pricing, Login, & Book a Demo

Zocks Communications Website



Source: 7/13/26 Zocks Communications Website; 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communications is Not a Frequent Acquirer



Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communications Has a Charitable Giving Program



Charitable Giving

Comments

-

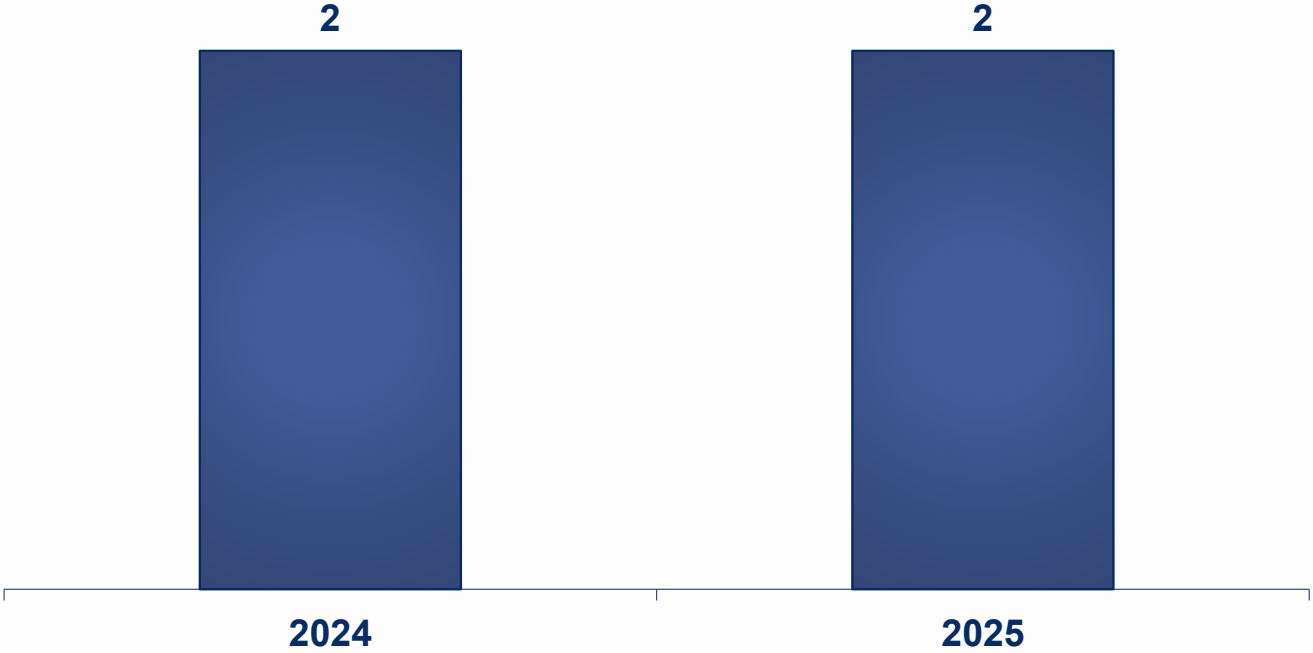
Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communications Has Two Office, Consistent Since 2024

Count of offices
on next page: 2



Zocks Communications Offices



Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communication's Offices Include San Francisco, CA & Budapest, Hungary

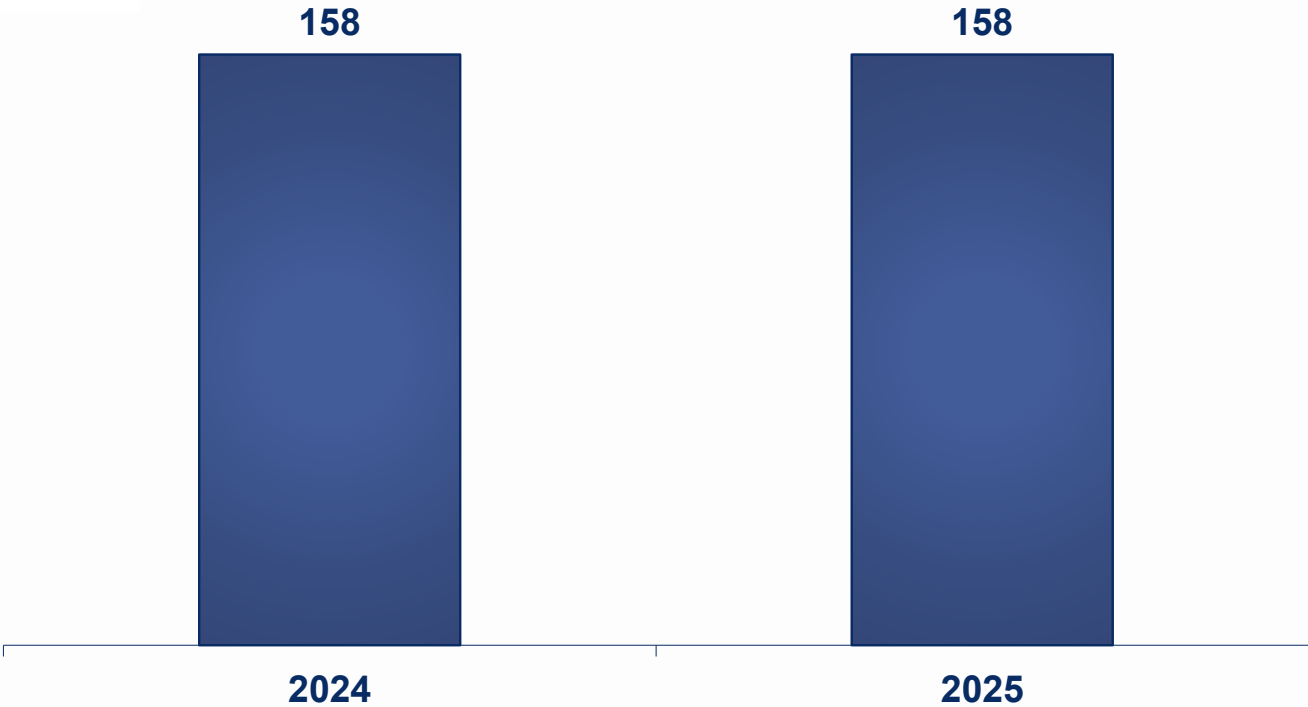
Zocks Communications Offices

- **San Francisco, CA**
- **Budapest, Hungary**
- **--**



Zocks Communications Has 158 Employees, Consistent Since 2024

**Zocks Communications
Employees**



Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communications Serves Institutional Clients

Needs data

Count of ICs on next page: X

Zocks Communications Institutional Clients



Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communication's Institutional Clients Include...

Zocks Communications Institutional Clients

• --

• --

• --



Zocks Communications Generates Revenues

Needs data

Zocks Communications Revenues (\$ Millions)



2024 2025

Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communications Earns Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA)

Needs data

Zocks Communications Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA) (\$ Millions)



2024

2025

Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communications Earns \$____ Million

Needs data

**Zocks Communications
Net Profits
(\$ Millions)**

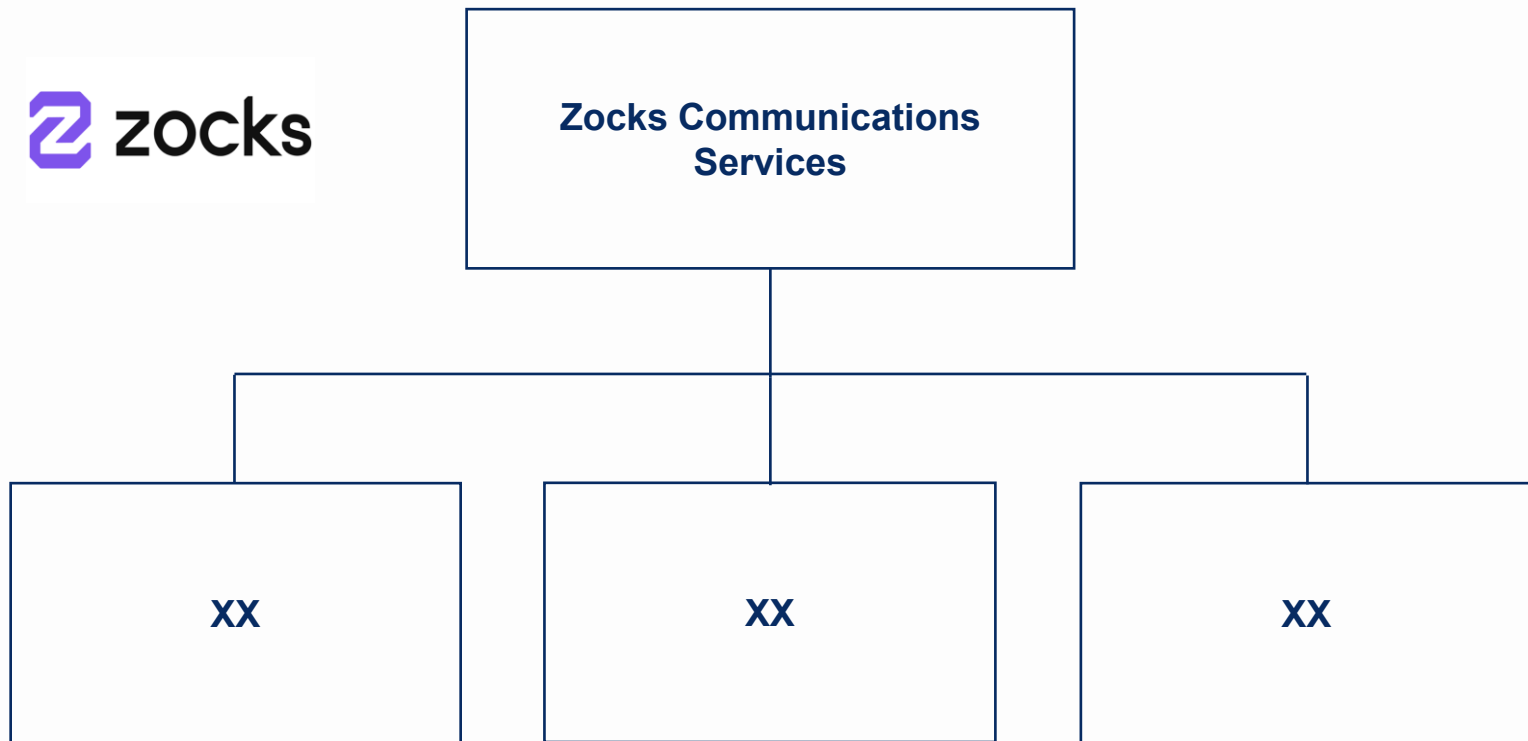


2024 2025

Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communications Has a Number of Services, Including XX, XX, & XX

Zocks Communications Services



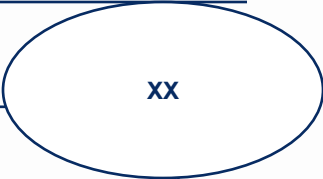
Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communication’s First Service is XX



Comments

-



Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communication's Second Service is XX



Comments

-

xx

Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communication's Third Service is XX



Comments

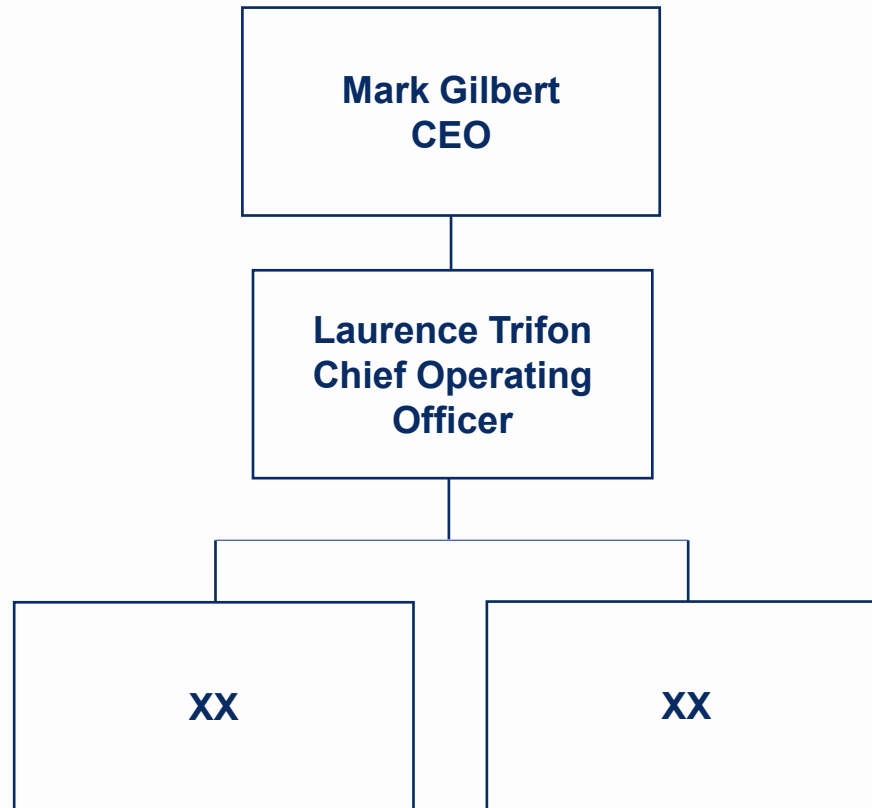
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xx

Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communications is Led by its CEO Mark Gilbert and Chief Operating Officer Laurence Trifon

Zocks Communications Organizational Chart



Note: Mark Gilbert founded the firm in 2022; he was previously at Hearsay Systems; Microsoft Corporation; & Twilio; Laurence Trifon joined the firm in 2026; he was previously at Contentful; Quartile; & Twilio

Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communications Has a Board of Directors that Includes XX, XX, & XX

**Zocks Communications
Board of Directors**

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

Zocks
Communications,
Inc. CIK#:
XXXXXXXXXX

Comments

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Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Needs data

**Zocks Communications
Assets
(\$ Millions)**



2024 2025

Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communications Has Liabilities

Needs data

Zocks Communications Liabilities (\$ Millions)



2024 2025

Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communications Has Shareholders Equity

Needs data

Zocks Communications Shareholders Equity (\$ Millions)



2024 2025

Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communications Earns... Per Share

Needs data

**Zocks Communications
Earnings Per Share**



2024 2025

Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communications Declares... Dividends Per Share

Needs data

Zocks Communications Dividends Per Share



2024 2025

Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Needs data

**Zocks Communications
Dividend Yield**



2024 2025

Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communication's Stock Price is...

Needs data

**Zocks Communications
Stock Price**



2024 2025

Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Needs data

**Zocks Communications
Shares Outstanding**



2024 2025

Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communication’s Market Capitalization is...

Needs data

**Zocks Communications
Market Capitalization
(\$ Millions)**

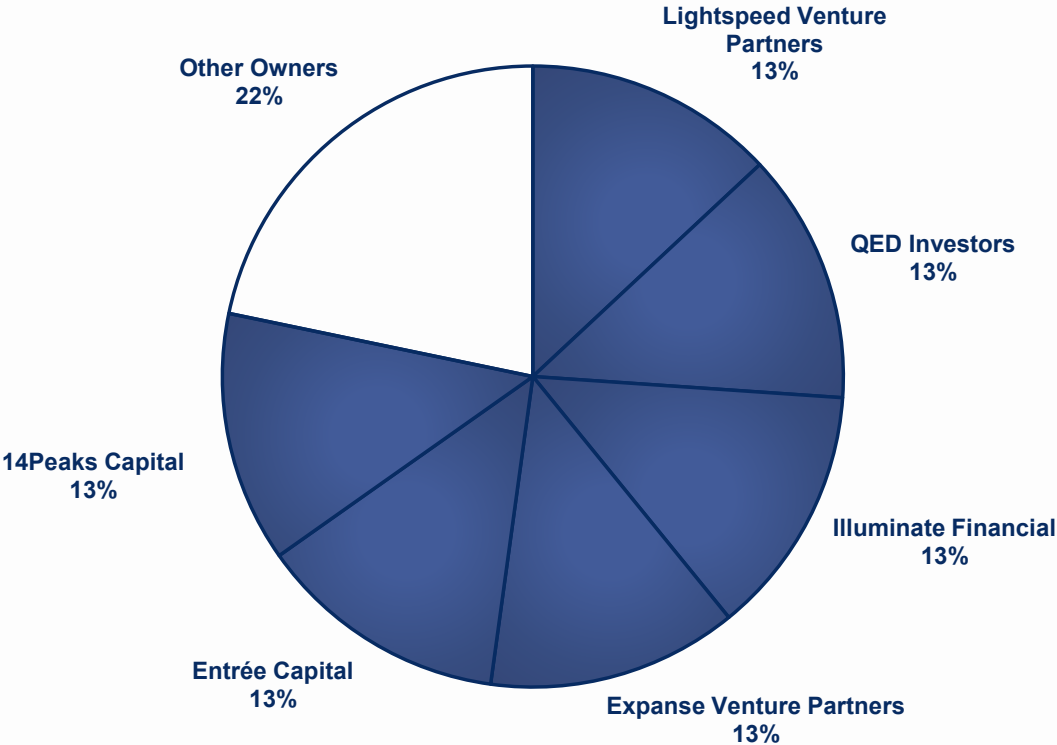


2024 2025

Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Needs more complete data

Zocks Communications Ownership By Owner



Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis

Zocks Communication's Stock Volume is...

Needs data

**Zocks Communications
Stock Volume**



2024 2025

Source: 7/8/26 Zocks Communications Website; Tiburon Research & Analysis



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