
BOCTRUST
FINANCIAL
SERVICES

Business Plan

July 2025

Content

Executive Summary

Executive Summary

Company Overview

Boctrust Capital Limited is an emerging investment advisory firm set to be registered and licensed by the Securities and Exchange Commission (SEC) in Nigeria. The Company is poised to fuel innovation, growth, and positive social impact across Africa. With a sector-agnostic approach, the Company partners with visionary entrepreneurs and provides expert investment advisory services to individuals and institutions. As a dedicated advisory firm, Boctrust will provide bespoke investment advisory services tailored to meet clients' needs within and outside Nigeria, with strong emphasis on regulatory compliance.

Vision

To be a leading catalyst for sustainable development and progress in Africa by supporting innovative startups and emerging enterprises.

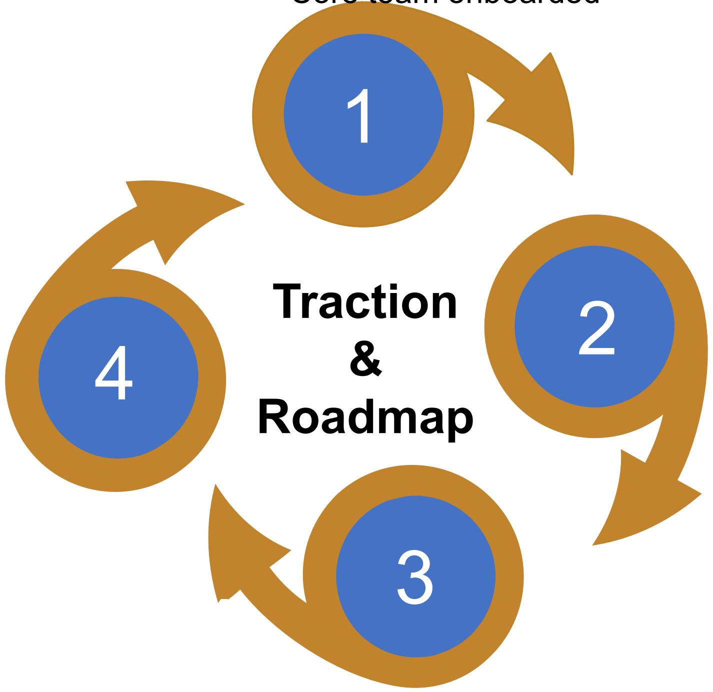
Mission

To empower entrepreneurs and investors through strategic advisory and investments, fostering economic growth, job creation, and positive societal impact.

Q3 2025

License

Core team onboarded



Q4 2025

First 50 Clients.

Q2 2026

Launch ESG /

Tech platform

2027

Regional expansion (Ghana, Kenya).

About Boctrust Capital

About Boctrust Capital Limited

Company Description

Boctrust Capital Limited (“Boctrust” or the “Company”) will operate as a SEC-licensed investment advisory firm in Nigeria. The Company will provide advisory services covering strategic portfolio construction, risk management, market insights, venture capital, and principal investment to both individual and corporate clients.

Regulatory Compliance

Bostrust is in the process of applying to the SEC for an investment advisory license, ensuring full compliance with all regulatory guidelines.

Market Analysis

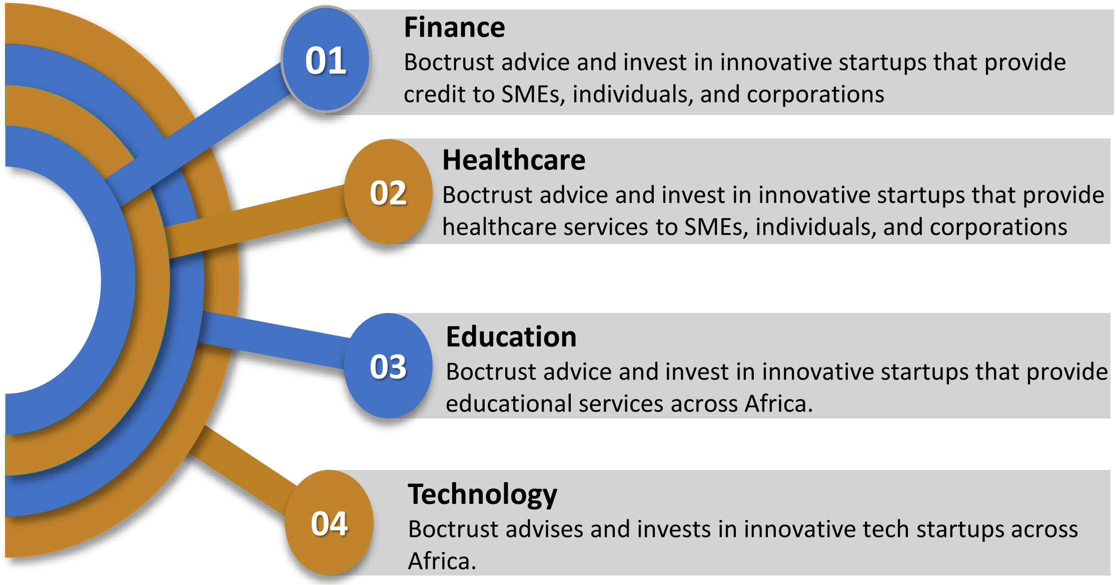
Industry Overview

The investment advisory services is a vital segment of the global financial services sector, providing investment advice for individuals and institutions. The industry is characterized by a lack of access to high-quality, unbiased investment advice, low investor confidence, poor financial literacy and expert guidance.

Market Opportunities

Nigeria’s Investment Advisory Market, estimated at $300M, is underpenetrated with less than 15% of investors receiving advice. Nigeria’s population, with growing capital market participation and huge fintech disruption, poses a huge market ready to be explored.

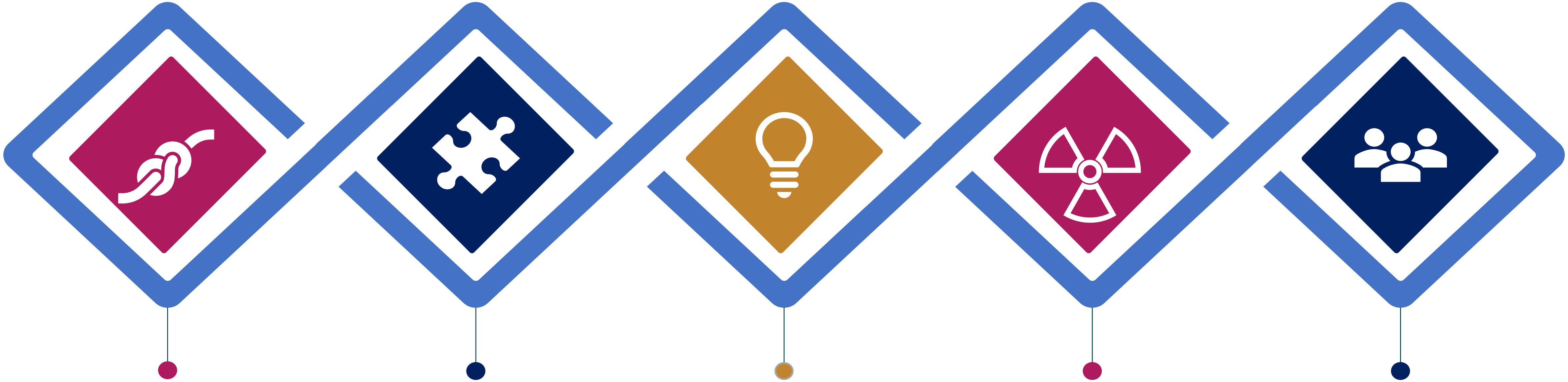
Market focus & clients



Our Core Values

1	Integrity	Upholding the highest ethical standards in every transaction and relationship
2	Excellence	Delivering top-tier performance and value to our investors and portfolio companies
3	Impact	Committing to measurable social and environmental outcomes, alongside robust financial returns
4	Innovation	Championing creative solutions and adaptive thinking to overcome Africa’s most pressing challenges
5	Collaboration	Fostering open, long-term partnerships built on mutual respect and shared goals

Our Services



Strategic Portfolio Construction

Tailored investment strategies to meet the unique needs and goals of our clients

Risk Management

Expert advice on managing risk and maximizing returns

Market Insights

In-depth market analysis and research to inform investment decisions

Venture Capital

Equity funding in innovative startups and high-potential companies

Principal Investments

Funding and support for emerging companies, including seed and growth-stage funding

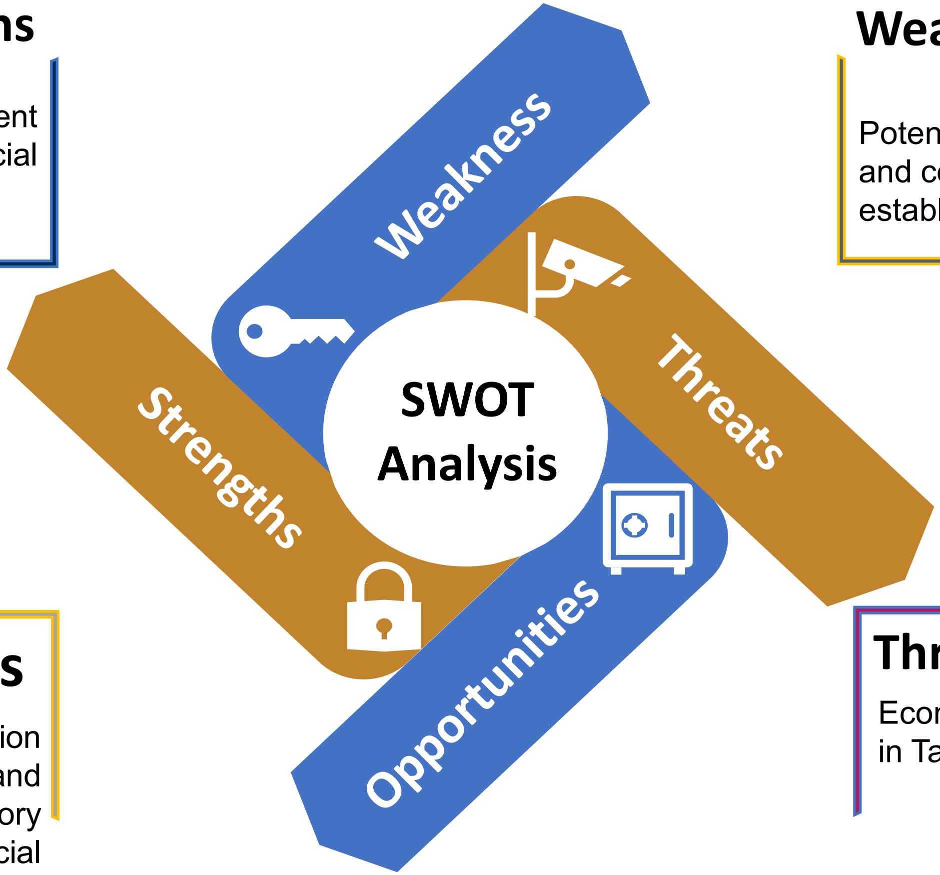
SWOT Analysis

Strengths

Access to leading investment research. experienced financial advisors, and strong network.

Weakness

Potential regulatory changes and competition from established firms.



Opportunities

Nigeria's exponential population growth, with increasing demand for holistic investment advisory services and a need for financial inclusion through literacy and advocacy.

Threats

Economic volatility and changes in Tax laws

Marketing and Sales Strategies

Marketing and Sales Strategies (1/3)

At Boctrust, our philosophy is rooted in delivering solutions, not selling products. We prioritise our clients’ unique goals, challenges, and aspirations, crafting personalised financial strategies that align with their needs. By focusing on building trust and delivering value, we ensure every recommendation is tailored to create lasting financial success."

- **Referral:-** happy clients are like an army of brand ambassadors waiting to spread the word about our services, so we desire to turn satisfied clients into raving advocates continually.

- **Geo-Fencing Campaigns:** creating virtual boundaries in specific locations with personalized messages to our targets using ads, special offers tailored to their needs.

- **Networking & Partnerships:** We will continue to tap into our networks for business collaboration and partnerships that align with our value propositions.

- **Podcast:** collaborate with identified podcaster who aligns with the target audience and resonates with our brand. All episodes of the podcast will be shared on all social media platforms.

- **Dominate the Local Market:** As a business with heart and soul, we understand the importance of impersonal corporations and community involvement. We plan to actively involve and invest in local causes, events, and initiatives.

- **Influence Amplification:** plans to enjoy a rub off effect from collaborating with thought leaders, renowned financial experts and influential personalities for credibility.

Marketing and Sales Strategies (2/3)

Marketing phase	Planned action
Stage 1 — Awareness (Stranger → Curious Prospect) **Goal:** Get noticed by people in our target audience. **Main channels:** Instagram, Facebook, LinkedIn, Google Search Ads, WhatsApp groups, radio interviews.	**Tactics:** **Instagram/Facebook Reels:** 30–45 sec videos on relatable topics like *"Why your savings is losing value every month"* or *"3 safe ways to invest in Nigeria without forex wahala."* **Time frame:** Continuous — aim for 2–3 pieces of content weekly + 1 paid ad campaign monthly
Stage 2 — Interest (Curious Prospect → Engaged Lead) **Goal:** Get them to give us contact info (WhatsApp number or email) in exchange for value. **Main channels:** WhatsApp Business, Instagram DM, Facebook Messenger, email sign-ups.	**Tactics: Lead magnet** **PDF guide:** "10 Smart Ways Nigerians Can Save & Grow Money in 2025" **Free Webinar:** "How to protect your savings from inflation and bad investments." **Time frame:** Always running; each awareness campaign should point to a lead magnet.
Stage 3 — Nurture (Engaged Lead → Warm Prospect) **Goal:** Building trust and showing our expertise so they feel safe to book with us. **Main channels:** WhatsApp broadcast list, email drip campaigns, Instagram stories, LinkedIn updates.	**Tactics:** Share **quick win tips** weekly: "Here's how to check if your investment company is SEC-registered." Share **screenshots of testimonials** (with client consent). **Time frame:** Minimum 2–3 touches per week per lead.

Marketing and Sales Strategies (3/3)

Marketing phase	Planned action
Stage 4 — Conversion (Warm Prospect → Paying Client) **Goal:** Get them to take the first paid step (low entry offer or full advisory package). **Main channels:** WhatsApp, phone calls, face-to-face meetings.	**Tactics:** Offer a low fund as the first step, easier to say yes to than a big package.
Stage 5 — Retention & Referral (Client → Loyal Advocate) **Goal:** Keep them as ongoing clients and turn them into referral sources. **Main channels:** WhatsApp, email newsletters, client-only webinars, referral incentives.	**Tactics:** **Quarterly progress reports**: “Your savings rate is now 28%, up from 15% in January.” **Referral reward**: Airtime or ₦5,000 Shoprite voucher per referral that becomes a paying client. Celebrate wins: Share “Client Success of the Month” (with permission) on social.
Funnel Metrics: Target benchmarks for first 12 months: **Awareness → Lead:** 2–5% of people reached give contact info. **Lead → Warm Prospect:** 20–40% engage with at least 3 pieces of your content. **Warm → Paid Client:** 5–15% conversion. **Retention:** 70%+ of clients renew or buy an additional service. **Referral rate:** 15–30% of new clients from referrals.	

FINANCIAL SERVICES

Financial Projections

Financial Projections

Start Up Cost

Details	Amount (₦)
Equity Investment (Share capital)	5,000,000
Staff Salary	7,200,000
Legal and Professional Expense	2,000,000
Accounting and Tax Consulting	105,000
Audit fee	75,000
Website and Email Expenses	200,000
Rent and Lease Expenses	8,000,000
Office Equipment	260,000

Financial Projections

	Year 1 (₦)	Year 2 (₦)	Year 3 (₦)
Revenue	100,000,000	115,000,000	138,000,000
Expenses:			
Personnel	12,000,000	12,000,000	14,100,000
Other Operating expenses	5,000,000	5,000,000	6,100,000
EBITDA	83,000,000	98,000,000	117,800,000
Depreciation & Amortization	754,869	905,843	1,087,011
Earnings before Interest and Tax	82,245,131	97,094,157	116,712,989
Tax	24,673,539	29,128,247	35,013,897
Net Income	57,571,592	67,965,910	81,699,092

Our Team

Our Team

Babajide 'Bosun Okusaga

A distinguished Chartered Surveyor and Investment Adviser with a strong record of creating, enhancing, preserving, and protecting wealth through real estate and capital market expertise. As a strategic leader, he provides firm-wide direction, oversees cross-functional collaboration, and promotes a culture of innovation and excellence

Hilary Eledu

A results-driven professional with over 20 years of experience in the financial services industry, recognized for driving business growth, innovation, and strategic planning. He brings deep expertise in capital market operations, financial modeling, business development, and client relationship management

Oluwaseun Adekanbi

A dynamic, growth-driven business and strategy manager with a strong passion for financial inclusion, women's empowerment, and the socioeconomic advancement of MSMEs. With over a decade of experience in the financial services industry, he is recognized for driving business growth, fostering innovation, and leading strategic initiatives.

Contact Details

Contact

BOCTRUST

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GET

IN TOUCH

With a strong focus on investment advisory, Boctrust Capital is well-positioned to support the growth and development of innovative startups and emerging enterprises in Africa.