



Achieve organic growth efficiently

Actionable intelligence to reach the right prospects

It is no secret that organic growth is a top priority for today's financial advisors.

That doesn't mean it is easy.

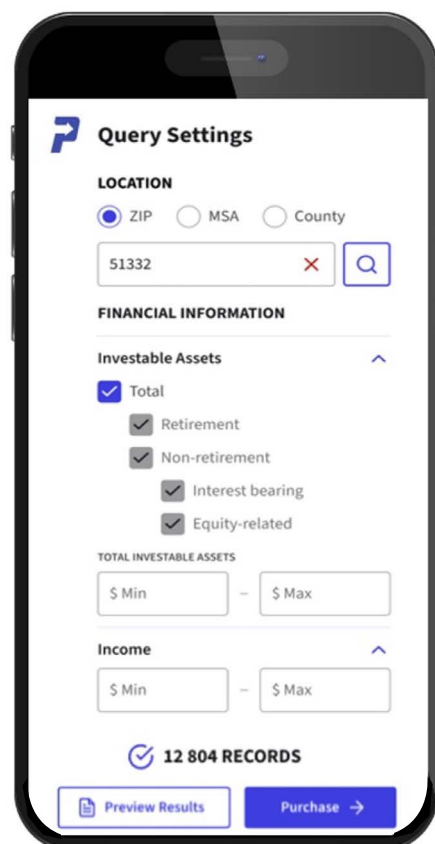
According to a recent study by The Ensemble Practice, the average RIA firm experienced organic growth of just 5.7% in 2023.¹

For advisors looking to grow beyond referrals, reaching the right prospects is key, particularly if you are relatively new to the industry, expanding your practice, launching a new service, or establishing a niche.

Transform the way you grow... with data

Wealth management firms and RIAs use our investable assets and income data to grow their businesses by targeting new clients based on a clear understanding of their assets (including checking/savings accounts, CDs, money market accounts, stocks, bonds, mutual funds, retirement accounts, and trusts) and their household income.

- Access a comprehensive financial profile to precisely target your ideal clients
- Build your ideal customer profile based on investable assets and total household income
- Drill down into investable assets data by retirement and non-retirement assets
- Score prospects based on key attributes



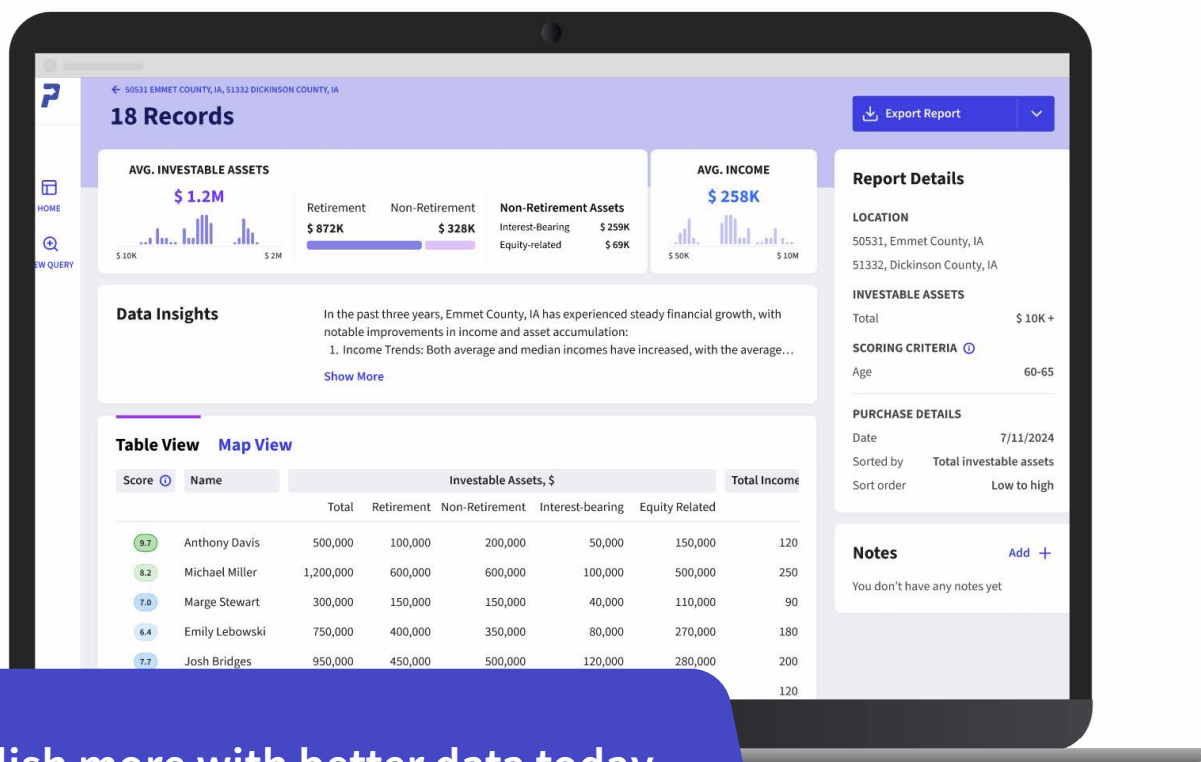
¹ Danny Noonan, "Organic Growth Is the North Star for Financial Advisors," Morningstar.com, November 14, 2024 <https://www.morningstar.com/financial-advisors/organic-growth-is-north-star-financial-advisors>

The most accurate wealth data available

Too often, so called “prospecting data” is incomplete, inaccurate, or not granular enough to be actionable.

Source of truth data on 100% of U.S. households and businesses

Our proprietary data sets are unmatched for scale and accuracy. Our database, originally developed by a team of PhD economists, is built on authoritative economic records from multiple government agencies, covering over 150 million households and 200 million adults in the U.S., providing a truly unique and actionable resource.



Accomplish more with better data today.

Contact us at sales@powerlytics.com to schedule a demo.

About Powerlytics

Powerlytics is transforming the way financial services firms achieve growth by delivering accurate, comprehensive data on 100% of U.S. households and businesses. Our proprietary data sets, built from trusted U.S. government sources, deliver frictionless, objective data for more strategic prospecting and business decision-making. Accomplish more with better data at [Powerlytics.com](https://www.powerlytics.com).