



Achieve organic growth efficiently

Reach the right prospects with TrueWealth

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

If you are 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 TrueWealth 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

A screenshot of the TrueWealth 'Query Settings' interface displayed on a smartphone. The interface is white with blue accents. At the top, it says 'Query Settings' with the Powerlytics logo. Under the 'LOCATION' section, there are radio buttons for 'ZIP', 'MSA', and 'County', with 'ZIP' selected. Below this is a text input field containing '51332' and a search icon. The 'FINANCIAL INFORMATION' section follows. Under 'Investable Assets', there is a 'Total' checkbox which is checked, and four sub-checkboxes: 'Retirement', 'Non-retirement', 'Interest bearing', and 'Equity-related', all of which are also checked. Below this are two input fields for 'TOTAL INVESTABLE ASSETS' labeled '\$ Min' and '\$ Max'. The 'Income' section has similar '\$ Min' and '\$ Max' input fields. At the bottom, it shows a checkmark icon and the text '12 804 RECORDS'. Two buttons are at the very bottom: 'Preview Results' and 'Purchase' with a right arrow.

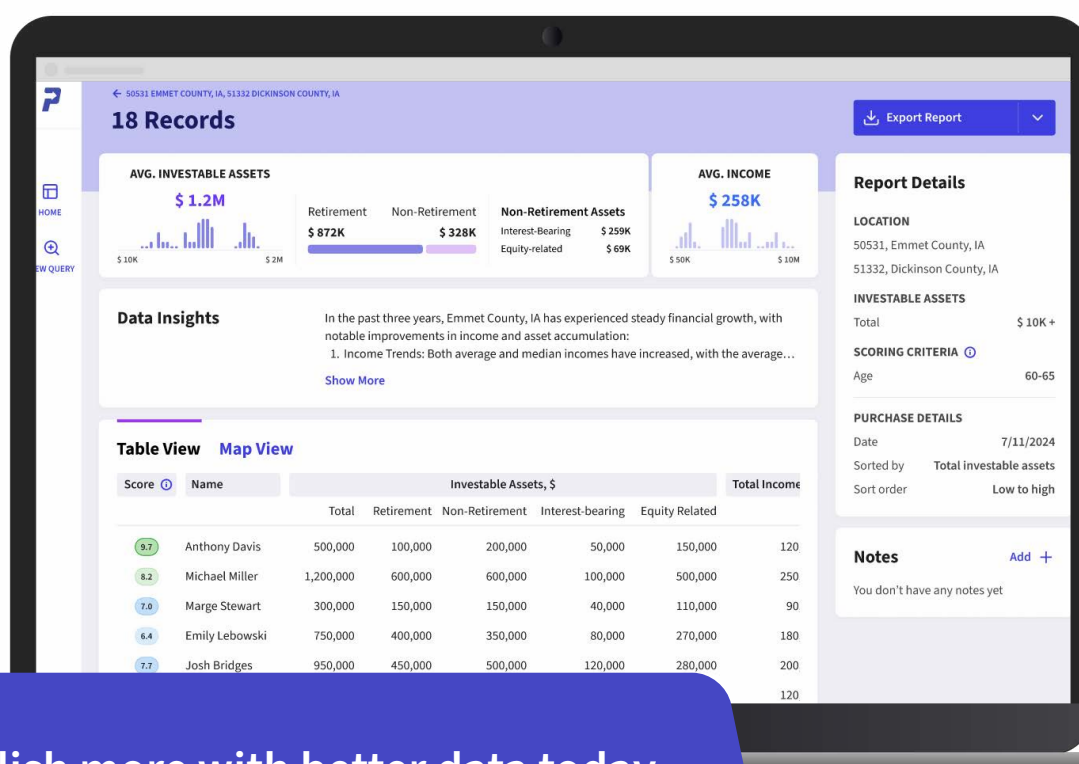
¹ Danny Noonan, "Organic Growth Is the North Star for Financial Advisors," Morningstar.com, November 14, 2024 <https://www.morningstar.com/financial-advisors/organic-growth-is-north-star-financial-advisors>

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).