



# Unlocking customer insights at scale

How leading financial institutions achieve precise customer segmentation

Imagine a leading U.S. financial institution with over 30 million customers. The marketing team recognizes the need to modernize its approach to segmentation.

## The goal

Identify and serve high-potential clients more effectively, without overburdening internal teams or creating extra steps for customers.

## The challenge

Traditional segmentation often relies on internal product usage and transaction data, methods that sometimes fail to accurately reflect customers' true financial capacity.

## Enter Powerlytics

Using only customer home address data, the institution partners with Powerlytics to execute a large-scale, data-driven segmentation initiative.

With access to Powerlytics' comprehensive U.S. household-level income and investable asset data, the institution matches each customer's home address to localized financial indicators. It creates a wealth segmentation framework with three distinct tiers:

- 1 Private Wealth** — High-income, high-net-worth customers warranting tailored support and relationship management
- 2 Mass Affluent** — Middle-tier households suited for investment planning, lending services, and personalized advice
- 3 Mass Market** — Broader population for scalable, digital-first offerings and financial education

This segmentation model requires no new disclosures, behaviors, or permissions from customers—just their verified home address already on file.

## Better data, more precision

- ✓ Highly accurate data, drawn from anonymized U.S. tax return data covering 100% of filers
- ✓ Simple for customers, requiring no additional input
- ✓ Scalable, applicable across 200M+ households



## Performance-driven growth

Through its partnership with Powerlytics, the institution transforms a basic customer data point—the home address—into a powerful lens for understanding wealth.

### Benefits

#### ✓ Streamlined execution

Segmentation is completed without surveys, interviews, or changes to onboarding

#### ✓ Granular insight

Powerlytics enables ZIP+4 level segmentation for hyper-local targeting and opportunity mapping

#### ✓ More accurate targeting

Financial capacity is inferred using verified external data, not just internal assumptions

#### ✓ Private wealth activation

Thousands of clients are newly identified as high-net-worth and transitioned to Private Wealth support

#### ✓ Marketing ROI improvements

Campaign spend is redirected with greater precision, reducing waste and improving engagement

**Smarter segmentation, better service alignment, and more efficient marketing, all executed at a national scale**

## Learn what some of the top 10 U.S. banks already know.

Use Powerlytics household-level income and asset data to enhance your institution's marketing and segmentation efforts. Schedule a meeting at [powerlytics.com/connect/](https://powerlytics.com/connect/)

Powerlytics.com | [sales@powerlytics.com](mailto:sales@powerlytics.com) | (215) 375-7675