Powerlytics

True Investable Assets by Powerlytics

Investable Asset Data for 100% of US Households

The Challenge

Wealth management firms are in a constant battle to **grow Assets Under Management (AUM)** while **banks** and **credit unions** face a similar challenge in **driving deposit growth**.

While creative marketing campaigns and promotions can play a role in achieving these goals, **accurate insights into household investable assets are the key to success** as they can enable optimization of targeted marketing, product and servicing strategies.

But **current sources of investable assets data have limitations:**

- Consortiums may only cover a limited percentage of households and access to the data is limited
- Survey data is not based on a source of truth, may lack accuracy, and deliver incomplete coverage.
- Clients or prospects may not provide their full portfolio, thus have more than they disclose

The Solution

To overcome these challenges, Powerlytics has leveraged its unique IP to develop **Powerlytics True Investable Assets**, the first solution delivering accurate investable assets estimates **covering 100% US households**.

Powerlytics clients can receive an accurate estimate of Total Investable Assets for over 150M US households and 200 million adults as well as a breakout of the following sub-components:

	Component	Asset Types
	1. Liquid Interest-bearing Assets	Deposits, CD's, Money-Market Funds, Bonds, Bond Funds, etc.
+	2. Liquid Equity-related Assets	Stocks, Equity Funds, ETF's, etc.
=	3. Total Liquid Assets	#1 + #2
+	4. Retirement Assets	IRA's 401K's Defined Contribution Plans
=	5. Total Investable Assets	#3 + #4

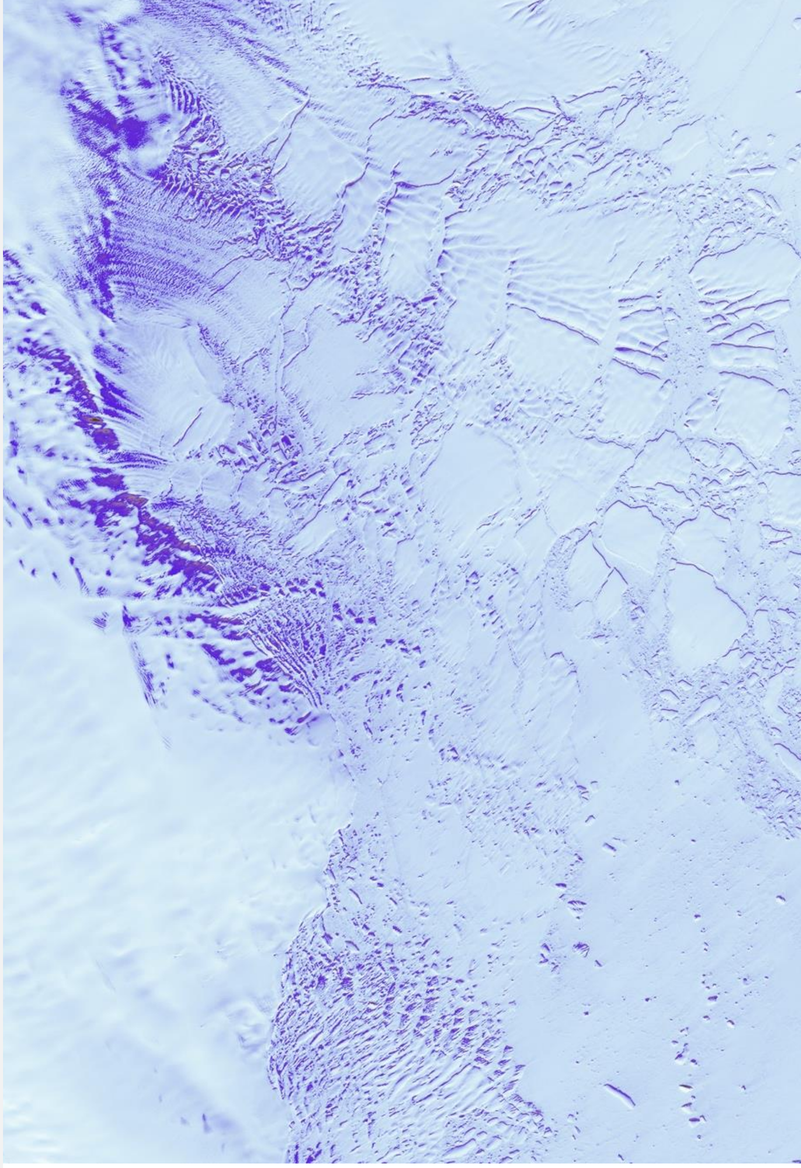
Key Differentiators

Coverage – Covers 100% of the US population vs. incomplete coverage in consortium-based or survey-based models.

No quid pro quo – Does not require you to share your customer data with competitors.

Reliable and Accurate – Based on Source of Truth data

No Marketing Limitations



Helping Wealth Management Firms Grow AUM & Segment Customers

Understand & Grow Current Client Share of Wallet – Gain insights into which clients offer the greatest AUM opportunity and optimize client servicing and marketing strategies.

Attract High-value New Clients – Understand which prospects offer greatest AUM potential and refine prospect targeting strategies.

Optimize corporate strategy – Understand the distribution of wealth across the US to optimize branch/advisor placement and optimize product and servicing strategies.

Helping Banks & Credit Unions Capture New Deposits

Grow Deposits Share of Wallet - Understand customer/member share of wallet and optimize marketing strategies to capture more deposits.

Attract High-value Customers/Members - Understand which prospects offer the greatest deposit potential and refine prospect targeting strategies.