

Beyond the Bracket: Enhancing High-Earner Campaign Accuracy

Industry: Financial Services (CPAs with Earnings >200K)

Client Overview:

EliteCPA Advisors, headquartered in Los Angeles, California, is a premier financial services firm specializing in tax advisory for high-net-worth individuals. With a workforce of 100–250 employees, they generate approximately \$120 million in annual revenue.

Results:

Achieved a significant lift in engagement rates and qualified lead generation among top-earning CPA audiences. Enhanced client portfolio targeting accuracy, resulting in more effective tax advisory campaigns.

Challenges:

Generic purchased lists resulted in poor engagement rates among equity partners and high-net-worth prospects. Difficulty in verifying the income brackets of targeted CPAs compromised campaign accuracy.

Client Feedback:

"Infodepots provided the precision data we needed to connect with the right high-net-worth professionals. Their custom lists and data enhancement services greatly improved our marketing effectiveness."

Solution:

Delivered customized, income-verified CPA and W2 earner lists tailored for tax advisory marketing. Appended missing financial attributes, enhancing the firm's ultra-high-net-worth segmentation strategies.

+1 833-936-4636

www.infodepots.com

228 Park Ave S 60111 New York, NY 10003

