

BOUTIQUE CPA FIRMS, BIG RETURNS: CURATED EMAIL TARGETING

**INDUSTRY: FINANCIAL SERVICES (CPAS WITH
EARNINGS >85 MILLION)**

CLIENT OVERVIEW:

WealthGuard Advisors, headquartered in San Francisco, California, operates within the financial services sector, generating \$85 million in revenue and employing between 50 and 120 professionals.

OBJECTIVE:

The client sought highly targeted email lists of CPAs managing ultra-high-net-worth (UHNW) portfolios and required data appending to pinpoint W2 earners with incomes exceeding \$250,000 in the California tech and biotech industries.

CHALLENGES:

- Generic lead lists produced less than 5% response rates from top-tier CPAs.
- Struggled to accurately verify income levels and separate boutique CPA firms from larger enterprise practices.

SOLUTION:

- Provided curated and income-verified lists of CPAs and W2 earners specifically segmented by sector and firm size.
- Enhanced the client's outreach by validating and categorizing firms to focus exclusively on boutique CPA practices.



RESULTS:

- Boosted email response rates by over 40% through precision-targeted campaigns.
- Enabled direct engagement with niche CPAs, improving the efficiency of wealth management marketing efforts.

CLIENT FEEDBACK:

"Infodepots' precision targeting changed the way we reach UHNW advisors. Their attention to data quality made a measurable impact on our campaign results."



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