

# Precision Targeting of High-Net-Worth Financial Leads

**Industry: Financial Services / Accounting**

## Client Overview:

Sterling Wealth Management, based in Palo Alto, California, generates \$120 million in revenue with 90–150 employees. The firm specializes in wealth management solutions for clients in the technology sector.

## Objective:

To access a highly targeted list of CPAs and financial advisors serving high-net-worth individuals (earnings above \$250,000) in the tech industry.

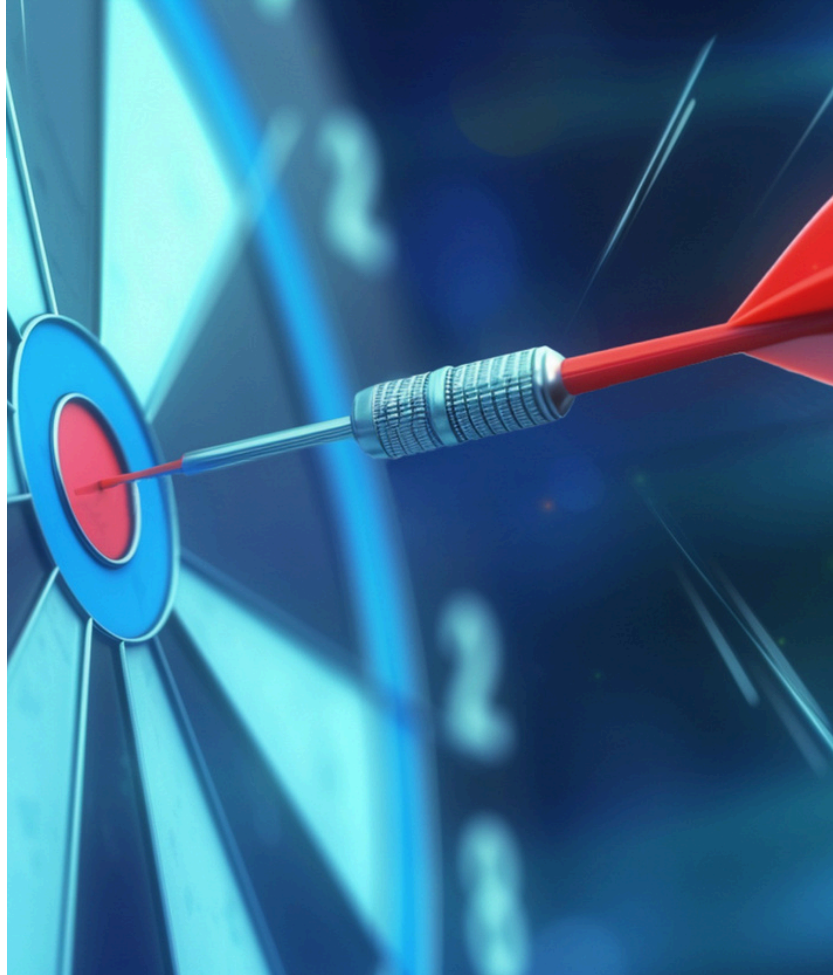
## Challenges:

- Generic data lists included mostly low-value prospects.
- Finding the right income brackets for the target leads was challenging.

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## Solution:

- Supplied curated financial services contact lists segmented by verified income indicators.
- Applied additional filters for tech-sector alignment to refine the dataset.

## Results:

- Increased high-value lead acquisition by 45% within the first quarter.
- Significantly improved ROI on outbound financial advisory campaigns.

## Client Feedback:

"The precision of Infodepots' data directly impacted our ability to reach the right high-net-worth clients and expand our tech-focused advisory base."