

Empowering Wealth Management Outreach with Infodepots Data

Industry: Financial Services

Client Overview:

Elite Financial Partners, based in New York, NY, is a boutique financial services firm specializing in wealth management and investment strategies for affluent clients. With revenues of \$110 million and a staff strength of 75 to 130 professionals, the firm caters to high-net-worth individuals across the Northeast U.S.

Challenges:

- Income data from generic sources proved unreliable and inaccurate.
- Difficulty in validating actual client portfolio qualifications.



Objectives

To acquire verified contact lists of Certified Public Accountants (CPAs) and financial advisors managing clients with annual incomes exceeding \$250,000.



Solutions

- INFO DEPOTS delivered meticulously researched lists of CPAs and financial advisors segmented by income brackets and client base.
- Verification methods ensured accuracy in identifying professionals serving high-net-worth clients.

Results:

- Access to reliable and income-qualified financial professionals improved targeting precision.
- Increased efficiency of campaigns by eliminating unqualified contacts.

Client Feedback:

"INFO DEPOTS provided us with the precision and reliability we needed. Their ability to deliver income-verified, high-value contact lists gave us a competitive advantage in reaching the right advisors."